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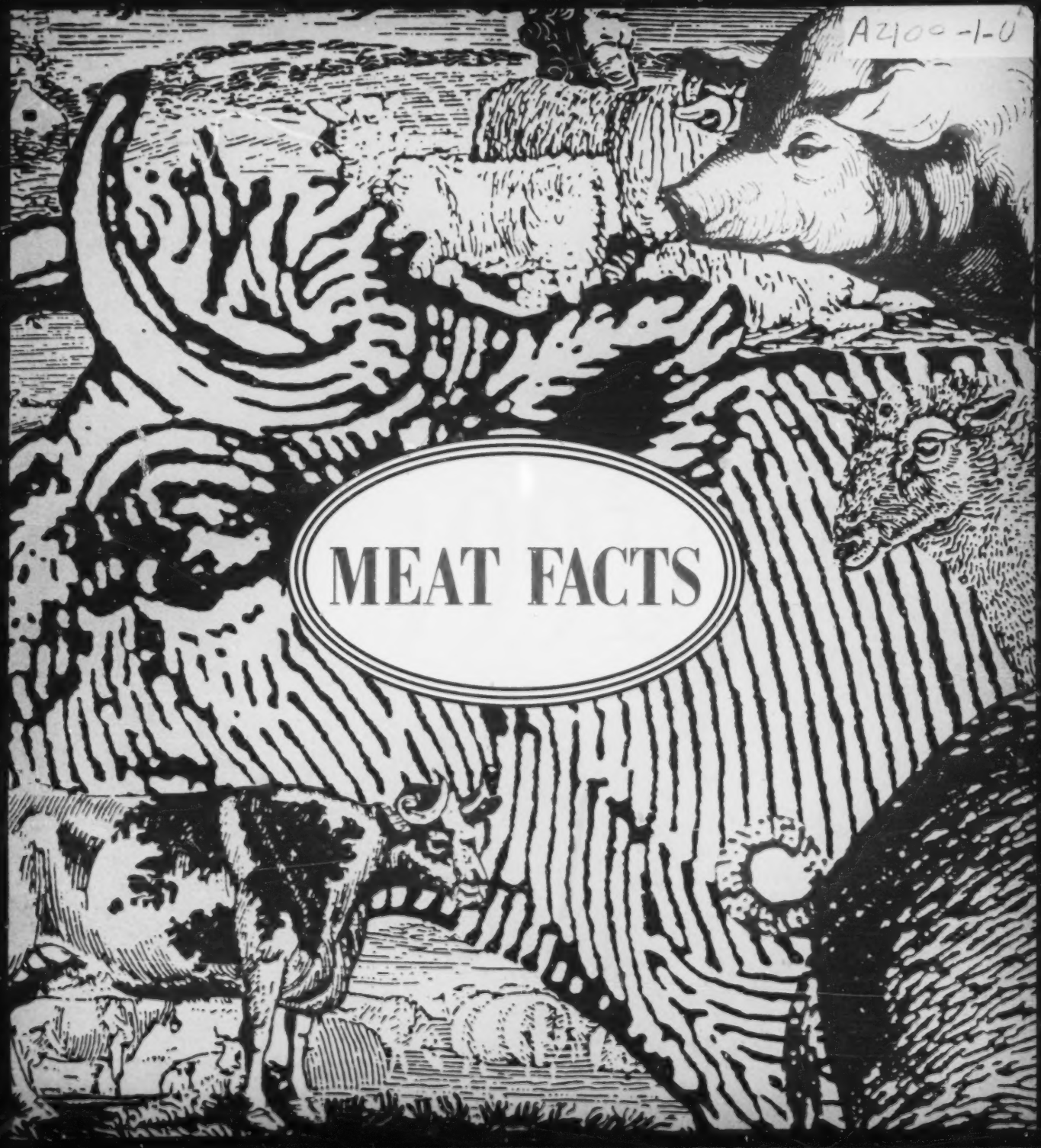

MEAT FACTS

MEAT FACTS

This is the twenty-first annual edition of MEATFACTS, a newly expanded statistical summary of the U.S. meat industry.

The tables and graphs on the following pages provide an overview of both past trends and current developments in the livestock and meat sector, including:

—Livestock supplies and marketings
—Slaughter and meat production
—Prices at the live, wholesale and retail levels
—Meat consumption and consumer spending
—U.S. imports and exports of meat and meat products

New to MEATFACTS '91 are several data series designed to provide readers with an enhanced perspective on two of the more topical issues facing the industry today: structural changes in the production and packing sectors and the meat industry's growing emphasis on international trade.

Sixteen new pages of information are contained in MEATFACTS '91. Trends on captive fed cattle supplies and carcass-based livestock purchases are reported here for the first time. Also new to MEATFACTS '91 are boxed beef and total meat production shares of the top 4, 8 and 20 companies. Complementing MEATFACTS' traditional data sets on the livestock and meat industry, these new series should help readers understand more fully important trends in this, the largest, component of the U.S. agricultural sector.

Also, MEATFACTS '91 has expanded its reporting of the international meat situation, with data series on livestock inventories; meat production; meat consumption; and beef, pork and lamb trade in selected countries.

The American Meat Institute hopes MEATFACTS '91 proves useful in promoting a better understanding of the American meat industry.

J. Patrick Boyle
President & CEO
American Meat Institute

Jens Knutson
Director, Economic Research
American Meat Institute

August 1991

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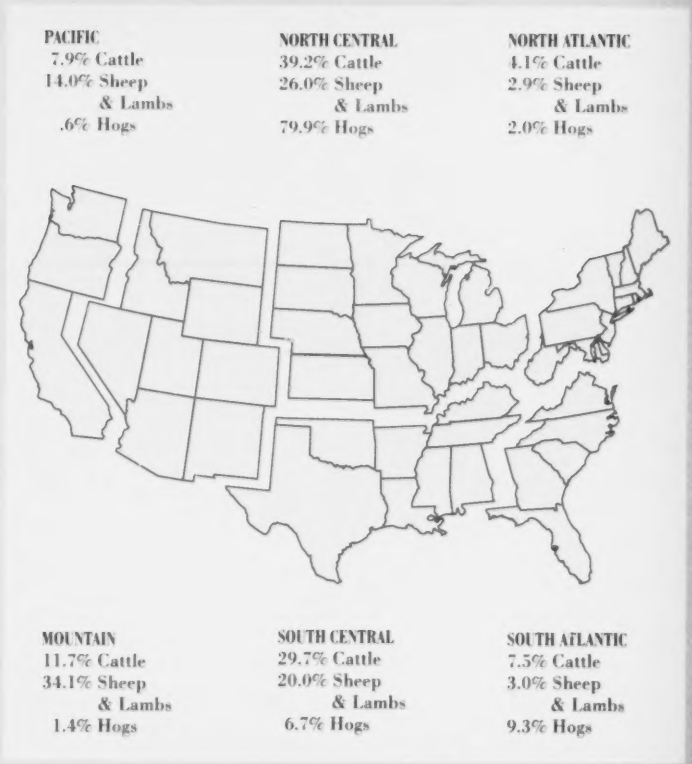
Cattle, Sheep and Hogs on Farms January 1, 1925–91
And Total U.S. Resident Population July 1, 1925–91

	CATTLE AND CALVES	SHEEP AND LAMBS	HOGS[1]	TOTAL RESIDENT POPULATION
		Thousand Head		Millions
1925	63,373	38,543	55,570	115.8
1930	61,003	51,565	55,705	123.1
1935	68,846	51,808	39,066	127.3
1940	68,309	52,107	61,165	132.0
1945	85,573	46,520	59,373	132.5
1950	77,963	29,826	58,937	151.9
1955	96,592	31,582	50,474	165.1
1956	95,900	31,157	55,354	168.1
1957	92,860	30,654	51,897	171.2
1958	91,176	31,217	51,517	174.1
1959	93,322	32,606	58,045	177.1
1960	96,236	33,170	59,026	180.0
1961	97,700	32,725	55,560	183.0
1962	100,369	30,969	61,837	185.8
1963	104,488	29,176	62,726	188.5
1964	107,903	27,116	62,060	191.1
1965	109,000	25,127	56,106	193.5
1966	108,862	24,734	50,519	195.6
1967	108,783	23,953	57,125	197.5
1968	109,371	22,223	58,818	199.4
1969	110,015	21,350	60,829	201.4
1970	112,369	20,423	57,046	204.0
1971	114,578	19,731	67,285	206.8
1972	117,862	18,739	62,412	209.3
1973	121,539	17,641	59,017	211.4
1974	127,788	16,310	60,614	213.3
1975	132,028	14,515	54,693	215.5
1976	127,980	13,311	49,267	217.6
1977	122,810	12,722	54,934	219.8
1978	116,375	12,421	56,539	222.1
1979	110,864	12,365	60,356	224.6
1980	111,192	12,687	67,318	227.2
1981	114,321	12,936	64,462	229.4
1982	115,604	12,966	58,698	231.6
1983	115,199	12,026	54,534	233.8
1984	113,700	11,487	56,694	235.8
1985	109,749	10,443	54,073	237.9
1986	105,468	9,983	52,313	240.1
1987	102,000	10,334	50,920	242.3
1988	99,622	10,945	54,384	244.5
1989	98,065	10,858	55,469	246.8
1990	98,162	11,363	53,821	249.7
1991	99,436	11,200	54,562	252.7*

Source: U.S. Departments of Agriculture and Commerce
1Beginning in 1962 figures are for Dec. 1 of previous year
****Estimated***

Cattle and Calves, Sheep and Lambs on Farms January 1, 1991, and Hogs December 1, 1990, by State

	CATTLE & CALVES	SHEEP & LAMBS	ALL HOGS
	Thousand Head		
PACIFIC			
Washington	1,340	81	56
Oregon	1,500	466	80
California	4,750	1,015	180
Alaska	7	2	1
Hawaii	214	N.A.	36
MOUNTAIN			
Montana	2,400	683	185
Idaho	1,740	272	60
Wyoming	1,190	830	20
Colorado	2,800	710	300
New Mexico	1,340	462	27
Arizona	840	250	110
Utah	810	508	33
Nevada	520	99	14
NORTH CENTRAL			
Ohio	1,580	305	2,000
Indiana	1,225	100	4,300
Illinois	2,000	145	5,700
Michigan	1,225	115	1,250
Wisconsin	4,170	103	1,200
Minnesota	2,760	300	4,500
Iowa	4,750	465	14,000
Missouri	4,500	134	2,800
South Dakota	3,400	640	1,770
North Dakota	1,700	222	265
Nebraska	6,000	165	4,300
Kansas	5,700	213	1,500
SOUTH CENTRAL			
Kentucky	2,500	35	920
Tennessee	2,250	14	620
Alabama	1,800	11	400
Mississippi	1,290	N.A.	149
Arkansas	1,690	N.A.	760
Louisiana	1,020	16	50
Oklahoma	5,550	135	215
Texas	13,400	2,000	550
NORTH ATLANTIC			
New England[1]	596	83	69
New York	1,550	92	103
New Jersey	70	11	25
Pennsylvania	1,820	140	920
SOUTH ATLANTIC			
Delaware	28	N.A.	31
Maryland	320	30	162
Virginia	1,730	157	430
West Virginia	515	85	30
North Carolina	950	17	2,800
South Carolina	575	N.A.	410
Georgia	1,420	N.A.	1,100
Florida	1,900	N.A.	130
TOTAL U.S.	**99,436**	**11,200**	**54,562**



Source: U.S. Department of Agriculture
1Maine, New Hampshire, Vermont, Massachusetts, Rhode Island and Connecticut
N.A.—Not Available

Number of Operations with Livestock, by State and by Species, 1990

	CATTLE	MILK COWS	HOGS	SHEEP
	Number of Operations			
NORTH ATLANTIC				
New England[1]	6,170	5,460	4,840	3,260
New York	8,000	13,000	2,900	2,400
New Jersey	1,000	450	700	700
Pennsylvania	15,000	15,500	8,000	3,800
NORTH CENTRAL				
Ohio	23,000	9,000	13,600	7,400
Indiana	20,000	5,000	14,000	3,500
Illinois	21,000	3,900	15,300	5,100
Michigan	8,500	6,500	6,000	2,600
Wisconsin	9,700	33,000	9,400	2,800
Minnesota	15,000	15,500	15,000	5,200
Iowa	31,000	7,800	35,000	10,000
Missouri	67,000	8,000	16,000	3,400
South Dakota	18,500	3,600	8,000	4,100
North Dakota	14,000	2,400	2,100	1,900
Nebraska	24,000	3,300	12,500	3,200
Kansas	30,000	2,400	6,000	2,600
SOUTH ATLANTIC				
Delaware	220	160	420	N.A.
Maryland	3,600	1,800	1,400	1,200
Virginia	28,000	3,000	3,500	2,500
West Virginia	14,500	1,500	2,300	2,000
North Carolina	26,000	2,000	10,000	600
South Carolina	14,000	1,200	8,800	N.A.
Georgia	27,000	1,500	8,800	N.A.
Florida	18,000	1,200	5,000	N.A.
SOUTH CENTRAL				
Kentucky	46,000	6,500	7,500	1,100
Tennessee	59,000	4,500	8,500	650
Alabama	36,000	1,200	6,700	N.A.
Mississippi	25,000	1,500	6,000	N.A.
Arkansas	29,000	2,000	3,100	N.A.
Louisiana	19,000	2,100	2,500	1,200
Oklahoma	51,000	3,400	5,500	2,700
Texas	120,000	5,700	11,000	8,200
MOUNTAIN				
Montana	12,300	1,900	1,500	2,800
Idaho	8,500	2,200	2,000	2,000
Wyoming	5,100	700	400	1,500
Colorado	10,800	1,700	2,000	2,400
New Mexico	7,000	1,200	900	1,200
Arizona	2,800	500	400	450
Utah	5,000	1,500	900	2,100
Nevada	1,400	3,300	140	300
PACIFIC				
Washington	15,000	3,000	2,500	2,200
Oregon	17,000	2,100	2,400	5,100
California	18,000	4,500	4,000	5,500
Alaska	80	40	40	30
Hawaii	850	80	500	N.A.
TOTAL U.S.	**932,020**	**193,790**	**278,040**	**109,690**

Source: U.S. Department of Agriculture *N.A. = Not Available, but included in total.*

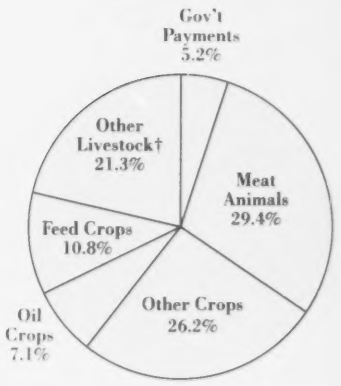
[1]Maine, New Hampshire, Vermont, Massachusetts, Rhode Island and Connecticut

Cash Receipts from Farm Marketings of Meat Animals, by State, 1990

		CATTLE AND CALVES	HOGS	SHEEP AND LAMBS	TOTAL
		Millions of Dollars			
1	Texas	$5,816.3	$90.5	$69.1	$5,975.9
2	Nebraska	4,842.3	898.4	9.1	5,749.8
3	Iowa	2,073.9	2,989.1	24.8	5,087.8
4	Kansas	4,345.6	319.9	13.8	4,679.3
5	Colorado	2,610.2	52.8	45.2	2,708.2
6	South Dakota	1,580.2	409.0	26.8	2,016.0
7	Illinois	802.3	1,206.3	7.3	2,015.9
8	Minnesota	914.8	965.4	12.4	1,892.6
9	Oklahoma	1,791.3	57.3	2.8	1,851.4
10	California	1,739.9	38.5	44.6	1,823.0
11	Missouri	908.7	560.4	4.5	1,473.6
12	Indiana	347.4	893.3	3.1	1,243.8
13	Wisconsin	883.4	242.3	4.2	1,129.9
14	Kentucky	682.1	185.1	1.2	868.4
15	Ohio	398.3	449.0	7.1	854.4
16	New Mexico	785.1	4.1	8.5	797.7
17	North Carolina	178.7	615.1	.2	794.0
18	Montana	725.5	42.2	18.7	786.4
19	Idaho	704.9	11.1	11.6	727.6
20	Arkansas	537.7	155.6	N.A.	693.3
21	Pennsylvania	470.0	180.0	3.4	653.4
22	North Dakota	597.9	45.2	5.5	648.6
23	Tennessee	497.2	138.2	.4	635.8
24	Washington	597.0	10.1	3.3	610.4
25	Alabama	510.4	95.3	N.A.	605.7
26	Wyoming	554.8	3.7	22.2	580.7
27	Arizona	504.7	19.7	9.7	534.1
28	Michigan	265.6	249.8	4.0	519.4
29	Georgia	272.5	238.2	N.A.	510.7
30	Virginia	408.3	92.3	5.3	505.9
31	Florida	390.6	20.0	N.A.	410.6
32	Oregon	351.2	18.4	13.6	383.2
33	Mississippi	297.7	36.0	N.A.	333.7
34	Utah	284.9	5.1	15.6	305.6
35	South Carolina	145.2	84.2	N.A.	229.4
36	Louisiana	211.4	8.9	.3	220.6
37	New York	196.2	18.7	2.1	217.0
38	Nevada	167.1	2.5	2.8	172.4
39	West Virginia	121.8	7.1	2.7	131.6
40	Maryland	78.6	33.3	.9	112.8
41	Vermont	49.0	.7	1.6	51.3
42	Hawaii	28.7	7.3	N.A.	36.0
43	Maine	19.6	1.8	1.0	22.4
44	Connecticut	16.1	.9	.5	17.5
45	New Jersey	14.7	1.6	1.0	17.3
46	Delaware	9.2	6.9	N.A.	16.1
47	Massachusetts	8.3	3.6	1.0	12.9
48	New Hampshire	7.7	.7	.6	9.0
49	Rhode Island	1.1	.6	N.A.	1.7
50	Alaska	1.0	.1	*	1.1
	TOTAL U.S.	$39,747.1	$11,516.4	$412.5	$51,676.0

Source: U.S. Department of Agriculture
**Less than 50,000*
Totals may not add due to rounding
N.A. = Not Available, but included in total

Cash Receipts from Farming, 1990



†Includes dairy products, poultry and eggs

Livestock Marketings, by State, 1990

	ALL CATTLE	CALVES	HOGS & PIGS	Sheep & LAMBS
	Thousand Head			
Alabama	550	271	674	*
Alaska	2	0	1	N.A.
Arizona	640	92	179	195
Arkansas	737	282	1,391	N.A.
California	2,191	174	297	710
Colorado	2,887	105	420	738
Connecticut	19	19	8	7
Delaware	12	2	63	N.A.
Florida	247	780	231	N.A.
Georgia	330	305	1,904	N.A.
Hawaii	58	7	49	N.A.
Idaho	837	110	103	252
Illinois	885	148	8,930	160
Indiana	465	156	7,166	74
Iowa	2,483	80	21,994	435
Kansas	4,942	1	2,468	253
Kentucky	865	544	1,532	32
Louisiana	180	310	88	7
Maine	26	28	16	15
Maryland	80	49	318	23
Massachusetts	12	19	37	13
Michigan	324	41	2,014	77
Minnesota	1,060	121	7,685	217
Mississippi	337	380	295	N.A.
Missouri	825	960	4,485	98
Montana	1,047	310	376	474
Nebraska	5,483	70	6,917	189
Nevada	195	134	27	68
New Hampshire	8	11	8	9
New Jersey	12	20	34	20
New Mexico	1,100	300	39	235
New York	210	484	176	55
North Carolina	200	175	5,044	6
North Dakota	458	610	429	123
Ohio	490	159	3,455	134
Oklahoma	2,470	230	431	63
Oregon	412	130	145	248
Pennsylvania	510	315	1,424	75
Rhode Island	2	2	6	N.A.
South Carolina	194	49	694	N.A.
South Dakota	1,509	410	3,027	453
Tennessee	680	406	1,254	9
Texas	7,360	200	699	1,169
Utah	301	75	45	378
Vermont	60	102	8	23
Virginia	516	160	729	102
Washington	668	60	87	69
West Virginia	150	101	52	57
Wisconsin	899	760	1,900	79
Wyoming	770	158	28	570
TOTAL U.S.	46,697	10,414	89,380	7,914

Source: U.S. Department of Agriculture
**Less than 500*
N.A. = Not Available, but included in total
Totals may not add due to rounding

Livestock Prices, 1982–90

	1982	1983	1984	1985	1986	1987	1988	1989	1990
	Dollars Per Hundred Pounds, Live								
Choice Steers, 1000–1100 lbs. at Omaha	$64.22	$62.52	$65.34	$58.37	$57.74	$64.60	$69.58	$72.52	$77.40
Select Steers, 1000–1100 lbs. at Omaha	59.47	56.99	59.14	53.28	52.04	58.53	67.06	70.28	75.23
Cows, Canner & Cutter, at Omaha	36.50	36.35	35.88	35.88	34.25	40.91	44.52	45.23	50.46
Feeder Steers, 600–700 lbs. at Kansas City	64.82	63.70	65.29	64.56	62.79	75.36	83.67	86.13	90.69
Barrows & Gilts at 7 Markets	55.07	47.33	48.98	44.50	51.36	51.71	43.25	43.77	54.45
Sows at 7 Markets	49.59	40.68	43.29	39.41	45.58	44.08	33.38	36.53	48.18

Source: U.S. Department of Agriculture

Livestock Prices Received by Farmers, Averages for All Grades, 1925–90

	BEEF CATTLE	CALVES	HOGS	LAMBS
	Dollars Per Hundred Pounds			
1925	$6.53	$8.59	$10.90	$12.40
1930	7.71	9.68	8.84	7.76
1935	6.04	7.16	8.65	7.28
1940	7.56	8.83	5.39	8.10
1945	12.10	13.00	14.00	13.10
1950	23.30	26.30	18.00	25.10
1951	28.70	32.00	20.00	31.00
1952	24.30	25.80	17.80	24.30
1953	16.30	16.70	21.40	19.30
1954	16.00	16.50	21.60	19.10
1955	15.60	16.70	15.00	18.40
1956	14.90	16.00	14.40	18.50
1957	17.20	18.70	17.80	19.90
1958	21.90	25.20	19.60	21.00
1959	22.60	26.70	14.10	18.70
1960	20.40	22.90	15.30	17.90
1961	20.20	23.70	16.60	15.80
1962	21.30	25.10	16.30	17.80
1963	19.90	24.00	14.90	18.10
1964	18.00	23.00	14.80	19.90
1965	19.90	22.10	20.60	22.80
1966	22.20	26.00	22.80	23.40
1967	22.30	26.30	18.90	22.10
1968	23.40	27.60	18.50	24.40
1969	26.20	31.50	22.20	27.20
1970	27.10	34.50	22.70	26.40
1971	29.00	36.40	17.50	25.90
1972	33.50	44.70	25.10	29.10
1973	42.80	56.60	38.40	35.10
1974	35.60	35.20	34.20	37.00
1975	32.30	27.20	46.10	42.10
1976	33.70	34.20	43.30	46.90
1977	34.40	36.90	39.40	51.30
1978	48.50	59.10	46.60	62.70
1979	66.00	88.80	41.80	66.70
1980	62.40	76.80	38.00	63.60
1981	58.60	64.00	43.90	54.90
1982	56.70	59.80	52.30	53.10
1983	55.50	61.70	46.80	53.90
1984	57.30	59.90	47.10	60.10
1985	53.70	62.10	44.00	67.70
1986	52.60	61.10	49.30	69.00
1987	61.10	78.50	51.20	77.60
1988	66.60	89.20	42.30	69.10
1989	69.50	90.80	42.50	66.10
1990	74.60	95.60	53.70	55.50

Source: U.S. Department of Agriculture

Average Prices Received for Livestock, by State, 1990

	STEERS & HEIFERS	CALVES	BARROWS & GILTS	LAMBS
	Dollars Per Hundred Pounds			
Alabama	$79.20	$90.10	$50.80	N.A.
Alaska	70.00	76.00	80.00	65.00
Arizona	76.50	91.90	55.00	62.10
Arkansas	82.60	94.60	50.00	N.A.
California	76.40	89.40	59.40	60.10
Colorado	80.00	99.80	56.60	54.40
Connecticut	63.00	77.00	50.00	100.00
Delaware	72.20	107.00	51.90	N.A.
Florida	78.80	97.80	51.30	N.A.
Georgia	76.10	89.00	53.50	N.A.
Hawaii	51.50	55.90	80.70	N.A.
Idaho	73.70	93.10	53.00	48.90
Illinois	76.60	119.00	54.80	53.10
Indiana	73.30	83.10	53.30	51.30
Iowa	78.10	95.60	55.40	53.30
Kansas	79.10	96.40	51.30	55.50
Kentucky	79.50	89.60	54.20	50.00
Louisiana	79.20	94.10	47.50	56.00
Maine	64.00	77.00	50.00	100.00
Maryland	72.20	107.00	51.90	57.30
Massachusetts	63.00	77.00	50.00	105.00
Michigan	70.80	99.00	53.30	55.00
Minnesota	74.90	100.00	55.70	53.70
Mississippi	79.40	94.30	52.80	N.A.
Missouri	84.60	93.80	54.40	50.80
Montana	83.30	95.30	50.80	48.30
Nebraska	80.00	100.00	55.30	54.00
Nevada	76.30	90.40	45.50	47.70
New Hampshire	64.00	76.00	50.00	100.00
New Jersey	65.20	107.00	50.20	60.70
New Mexico	77.30	96.80	51.10	50.20
New York	66.50	104.00	50.50	58.90
North Carolina	74.20	86.50	52.10	50.00
North Dakota	83.80	96.70	51.50	51.20
Ohio	75.60	87.90	53.20	54.50
Oklahoma	84.30	94.70	52.30	50.90
Oregon	79.10	88.80	55.20	51.80
Pennsylvania	73.40	112.00	55.20	58.60
Rhode Island	63.00	77.00	50.00	N.A.
South Carolina	76.10	93.20	52.90	N.A.
South Dakota	81.60	101.00	55.10	54.20
Tennessee	77.40	88.10	51.10	55.90
Texas	78.90	94.30	49.30	58.90
Utah	76.80	93.90	50.10	48.50
Vermont	64.00	76.00	50.00	98.00
Virginia	77.70	84.40	53.80	53.00
Washington	77.20	88.60	51.70	53.10
West Virginia	77.50	84.50	53.00	51.00
Wisconsin	72.80	140.00	54.00	54.20
Wyoming	86.30	101.00	54.20	50.00
TOTAL U.S.	78.80	95.60	54.40	55.50

Source: U.S. Department of Agriculture
N.A. = Not Available

Number of Feedlots and Cattle Marketed, by Feedlot Capacity, 1990

	UNDER 1,000	1,000 TO 8,000	8,000 TO 16,000	16,000 TO 32,000	32,000 & OVER	TOTAL
			Number of Feedlots			
Arizona	6*	—	—	5	3	14
California	7	17	10	10	8	52
Colorado	119	131	18	9	8	285
Iowa	14,780	220*	—	—	—	15,000
Kansas	1,616	190	46	35	13	1,900
Nebraska	7,320	402	51	23	4	7,800
Texas	648	45	41	33	33	800
7 Major States	24,496	1,005	166	115	69	25,851
% of Total	94.8	3.9	.6	.4	.3	100.0
13 States[1]	42,507	1,240	189	127	78	44,141
% of Total	96.3	2.8	.4	.3	.2	100.0
			Cattle Marketed, Thousand Head			
Arizona	11*	—	—	99	203	313
California	1	44	117	182	481	825
Colorado	40	500	290	330	1,035	2,195
Iowa	1,255	600*	—	—	—	1,855
Kansas	50	420	1,000	1,390	1,350	4,210
Nebraska	1,110	1,650	1,100	810	330	5,000
Texas	35	260	605	1,350	2,590	4,840
7 Major States	2,502	3,474	3,112	4,161	5,989	19,238
% of Total	13.0	18.1	16.2	21.6	31.1	100.0
13 States	3,474	4,034	3,389	4,763	6,901	22,561
% of Total	15.4	17.9	15.0	21.1	30.6	100.0

Source: U.S. Department of Agriculture
**Lots and marketings from other size groups included to avoid disclosing individual operations*
[1]Principal cattle feeding states include 7 major states and ID, IL, MN, OK, SD and WA

Captive Supplies of Fed Steers and Heifers as Percent of Top 4 and Top 15 Firms' Slaughter, 1988–90

	1988	1989	1990
		Percent of Slaughter	
TOP 4 FIRMS			
Packer Fed	4.7%	5.6%	5.1%
Contracted[1]	15.8	19.3	15.1
Total Captive	**20.5**	**24.9**	**20.1**
TOP 15 FIRMS			
Packer Fed	5.0	5.2	5.0
Contracted[1]	14.3	17.2	13.9
Total Captive	**19.3**	**22.4**	**18.9**

Source: U.S. Department of Agriculture
[1]Includes marketing agreements

Packer Purchases of Livestock Through Public Markets[1] as Percent of All Packer Purchases, 1975–89

	CATTLE	CALVES	HOGS	SHEEP & LAMBS
	Percent of Total Packer Purchases			
1975	32.6%	65.9%	28.2%	25.9%
1976	32.4	69.1	28.8	25.8
1977	30.2	65.6	27.5	23.3
1978	26.1	61.0	27.2	21.1
1979	22.3	58.1	25.1	18.4
1980	22.9	56.2	23.3	19.5
1981	22.6	57.3	21.6	22.0
1982	21.9	57.2	21.0	18.7
1983	22.4	51.6	23.2	17.6
1984	21.3	48.2	17.1	21.1
1985	19.9	45.4	15.8	19.6
1986	20.2	42.5	12.4	16.5
1987	19.8	39.0	11.2	18.5
1988	18.4	38.2	10.5	18.1
1989	17.5	31.5	10.5	16.8

Source: U.S. Department of Agriculture
[1]Includes auctions and terminal markets
Does not include packers purchasing less than $500,000 of livestock annually

Percent of Livestock Purchased on a Carcass Basis by 10 Largest and by All Packers, 1980–89

	CATTLE	CALVES	HOGS	SHEEP & LAMBS
10 LARGEST PACKERS[1]				
1980	34.8%	89.3%	16.5%	10.1%
1981	29.3	97.0	22.1	3.5
1982	38.0	95.7	21.3	9.1
1983	41.9	.0	22.0	10.9
1984	36.9	.0	21.2	13.4
1985	34.5	.0	23.4	42.0
1986	33.3	50.0	19.5	45.8
1987	30.9	.0	15.7	30.9
1988	41.6	.0	9.6	43.7
1989	41.2	.0	9.3	N.A.
ALL PACKERS[2]				
1980	27.4	21.1	11.0	28.3
1981	27.6	17.3	12.5	18.9
1982	32.6	22.2	14.2	28.9
1983	35.3	22.5	14.6	29.3
1984	31.2	30.5	14.4	21.2
1985	29.6	32.2	16.3	37.1
1986	31.9	31.2	14.8	47.4
1987	30.4	36.7	13.5	35.9
1988	35.9	43.8	10.7	41.5
1989	36.5	50.2	12.1	38.5

Source: U.S. Department of Agriculture

[1]Based upon the total dressed weight of all livestock slaughtered, the 10 largest packers in alphabetical order for 1989 were BeefAmerica; ConAgra; Excel; Farmland Foods; FDL Foods; IBP; John Morrell; National Beef Packing; Sara Lee; and Smithfield Foods

[2]Does not include packers purchasing less than $500,000 of livestock annually

N.A.—Not Available

Livestock Slaughter and Meat Production, 1925–1990

	SLAUGHTER				MEAT PRODUCTION				
	Cattle	Calves	Sheep & Lambs	Hogs	Beef	Veal	Lamb & Mutton	Pork	Total
	Thousand Head				Million Pounds				
1925	14,704	9,936	15,430	65,508	6,878	989	603	8,128	16,598
1930	12,056	7,761	21,125	67,272	5,917	792	825	8,482	16,016
1935	14,805	9,632	22,000	46,011	6,608	1,023	877	5,919	14,427
1940	14,958	9,089	21,571	77,610	7,175	981	876	10,044	19,076
1945	21,694	13,657	24,639	71,891	10,276	1,664	1,054	10,697	23,691
1950	18,614	10,501	13,244	79,263	9,534	1,230	597	10,714	22,075
1955	26,587	12,864	16,553	81,051	13,569	1,578	758	10,990	26,895
1960	26,029	8,615	16,240	84,150	14,753	1,109	768	11,607	28,237
1961	26,471	8,080	17,537	81,970	15,327	1,044	832	11,408	28,611
1962	26,911	7,857	17,168	83,424	15,324	1,015	808	11,827	28,974
1963	28,070	7,204	16,147	87,117	16,456	929	770	12,427	30,582
1964	31,678	7,632	14,895	86,284	18,456	1,013	715	12,513	32,697
1965	33,171	7,788	13,300	76,458	18,727	1,020	651	11,141	31,539
1966	34,173	6,863	13,004	75,382	19,726	910	650	11,339	32,625
1967	34,297	6,110	13,035	83,420	20,219	792	646	12,581	34,238
1968	35,418	5,616	12,120	86,417	20,880	734	602	13,064	35,280
1969	35,573	5,011	10,923	84,968	21,148	637	550	12,955	35,326
1970	35,356	4,203	10,801	87,052	21,652	588	551	13,426	36,217
1971	35,905	3,825	10,965	95,648	21,868	546	555	14,783	37,752
1972	36,134	3,201	10,525	85,865	22,381	458	543	13,617	36,999
1973	34,102	2,404	9,799	77,890	21,277	357	514	12,751	34,899
1974	37,353	3,175	9,064	83,083	23,138	486	465	13,805	37,894
1975	41,464	5,406	8,047	69,880	23,976	873	410	11,503	36,762
1976	43,199	5,527	6,911	74,959	25,969	853	371	12,415	39,608
1977	42,381	5,692	6,555	78,442	25,279	834	351	13,247	39,711
1978	39,970	4,302	5,543	78,417	24,242	632	309	13,393	38,576
1979	34,005	2,927	5,189	90,179	21,446	434	293	15,450	37,623
1980	34,116	2,679	5,742	97,174	21,644	400	318	16,615	38,977
1981	35,265	2,886	6,197	92,475	22,389	436	338	15,875	39,038
1982	36,158	3,106	6,643	82,844	22,536	448	365	14,229	37,578
1983	36,974	3,162	6,792	88,084	23,241	454	376	15,202	39,272
1984	37,892	3,367	6,900	85,641	23,596	495	380	14,812	39,283
1985	36,593	3,455	6,300	84,938	23,728	514	357	14,805	39,404
1986	37,568	3,478	5,762	79,956	24,371	524	337	14,063	39,296
1987	35,890	2,902	5,312	81,422	23,566	429	316	14,374	38,682
1988	35,324	2,565	5,392	88,136	23,590	395	335	15,684	40,004
1989	34,106	2,223	5,559	89,006	23,088	355	348	15,811	39,602
1990	33,439	1,838	5,750	85,431	22,743	327	362	15,353	38,785

Source: U.S. Department of Agriculture

Livestock Slaughter and Meat Production, 1989–90

LIVESTOCK SLAUGHTER

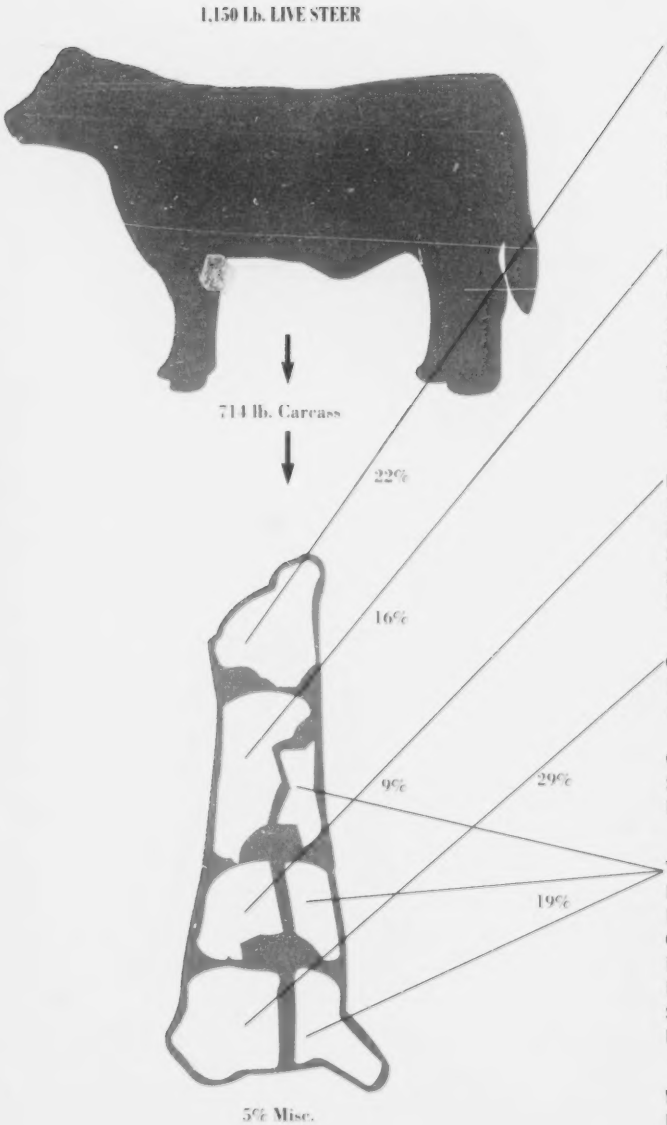
SPECIES AND CLASS OF SLAUGHTER	Number of Head Thousands	% of Total	Average Live Wt.	Number of Head Thousands	% of Total	Average Live Wt.
	1989			1990		
CATTLE						
Federally Inspected	33,010	96.8%	1,138	32,2[illegible]	96.9%	1,140
Other Commercial	907	2.7	1,006	[illegible]52	2.5	990
Farm	189	.5	N.A.	197	.6	N.A.
Total	34,106	100.0	N.A.	33,49[illegible]	100.0	N.A.
CALVES						
Federally Inspected	2,100	94.5	259	1,742	94.8	280
Other Commercial	73	3.3	420	48	2.6	417
Farm	50	2.2	N.A.	48	2.6	N.A.
Total	2,223	100.0	N.A.	1,838	100.0	N.A.
HOGS						
Federally Inspected	85,328	97.0	249	82,901	97.0	250
Other Commercial	2,364	2.7	230	2,235	2.6	229
Farm	314	.3	N.A.	296	.3	N.A.
Total	89,006	100.0	N.A.	85,431	100.0	N.A.
SHEEP AND LAMBS						
Federally Inspected	5,295	95.3	125	5,469	95.1	126
Other Commercial	170	3.1	102	185	3.2	101
Farm	94	1.7	N.A.	96	1.7	N.A.
Total	5,559	100.0	N.A.	5,750	100.0	N.A.

MEAT PRODUCTION

KIND OF MEAT AND CLASS OF SLAUGHTER	Dressed Weight Mil. Lbs.	% of Total	Average Dressed Wt.	Dressed Weight Mil. Lbs.	% of Total	Average Dressed Wt.
	1989			1990		
BEEF						
Federally Inspected	22,456	97.3%	683	22,152	97.4%	686
Other Commercial	519	2.2	604	482	2.1	596
Farm	113	.5	602	109	.5	600
Total	23,088	100.0	679	22,743	100.0	682
VEAL						
Federally Inspected	326	91.8	158	303	92.7	177
Other Commercial	18	5.1	256	13	3.9	264
Farm	11	3.1	219	11	3.4	227
Total	355	100.0	163	327	100.0	180
PORK						
Federally Inspected	15,375	97.2	179	14,933	97.3	181
Other Commercial	382	2.4	165	366	2.4	166
Farm	54	.3	179	54	.3	181
Total	15,811	100.0	179	15,353	100.0	180
LAMB AND MUTTON						
Federally Inspected	334	96.0	63	348	96.1	64
Other Commercial	8	2.3	51	9	2.5	51
Farm	6	1.7	59	5	1.4	60
Total	348	100.0	63	362	100.0	63

Source: U.S. Department of Agriculture
N.A.—Not Available Totals may not add due to rounding

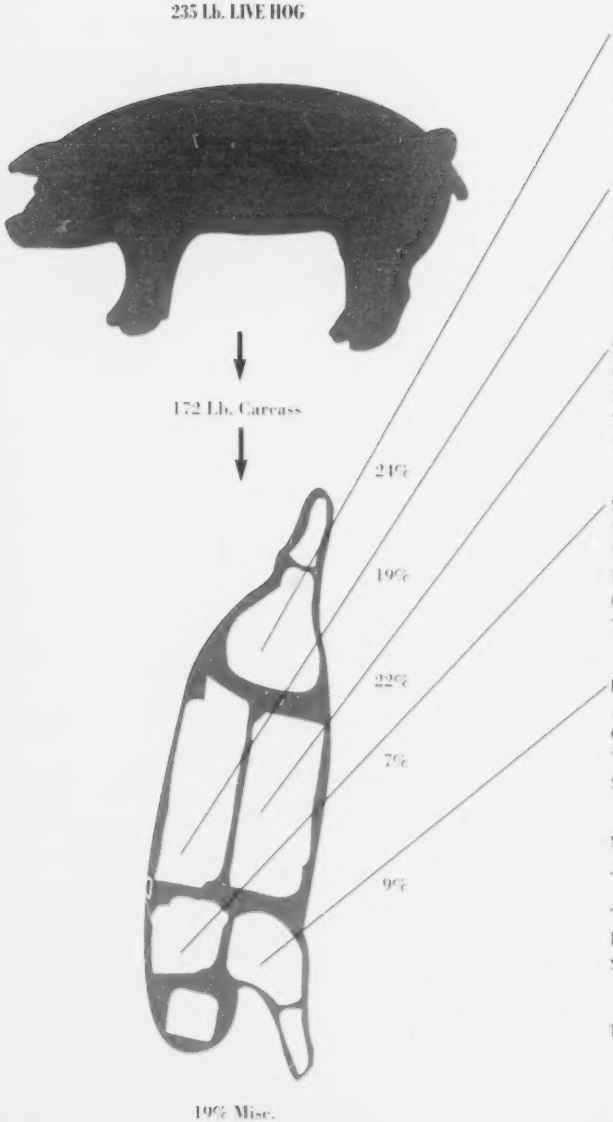
Steer Carcass Breakdown



	RETAIL BEEF	OTHER PRODUCTS	CARCASS TOTAL
		Pounds	
ROUND (155.8 lbs)			
Top round	34.6		
Bottom round	31.2		
Tip	16.8		
Rump	7.8		
Stewing, ground beef, etc.	33.4		
Fat, bone		32.0	
Total	**123.8**	**32.0**	**155.8**
LOIN (115.7 lbs)			
Porterhouse steak	19.6		
T-bone steak	9.8		
Strip steak	15.0		
Sirloin steak	15.3		
Tenderloin steak	6.8		
Stewing, ground beef, etc.	22.7		
Fat, bone	26.5		
Total	**89.2**	**26.5**	**115.7**
RIB (65.7 lbs)			
Rib roast	23.0		
Rib steak	9.2		
Short ribs	8.6		
Stewing, ground beef, etc.	16.5		
Fat, bone		8.4	
Total	**57.3**	**8.4**	**65.7**
CHUCK (209.5 lbs)			
Blade roasts & steaks	33.9		
Arm pot roasts & steaks	35.5		
Cross rib pot roast	25.4		
Stewing, ground beef, etc.	3.3		
Fat, bone	31.4		
Total	**178.1**	**31.4**	**209.5**
THIN CUTS (135.4 lbs)			
Flank steak	3.6		
Pastrami squares	2.9		
Outside skirt	2.2		
Inside skirt	2.5		
Boneless brisket	16.0		
Stewing, ground beef, etc.	87.3		
Fat bone		20.1	
Total	**114.5**	**20.1**	**134.6**
MISCELLANEOUS (32.8 lbs)			
Kidney, hanging tender	4.9		
Breaking fat		27.8	
Total	**4.9**	**27.8**	**32.7**
TOTAL	**567.8**	**146.2**	**714.0**

Source: Derived by AMI from USDA and industry figures

Hog Carcass Breakdown



	RETAIL PORK*	OTHER PRODUCTS	CARCASS TOTAL
		Pounds	
HAM (40.6 lbs)			
Cured ham	23.1		
Fresh ham	1.7		
Trimmings	5.1		
Skin, fat, bone		10.7	
Total	29.9	10.7	40.6
LOIN (32.1 lbs)			
Blade roast	7.4		
Center chops	16.0		
Sirloin roast	7.0		
Fat		1.7	
Total	30.4	1.7	32.1
SIDE (37.3 lbs)			
Cured bacon	19.0		
Spareribs	6.8		
Trimmings	9.6		
Fat		1.9	
Total	35.4	1.9	37.3
SHOULDER			
Boston Butt (12.2 lbs)			
Blade steaks	2.1		
Blade roast	1.3		
Cured butts	8.0		
Trimmings	.8		
Total	12.2		12.2
PICNIC (16.4 lbs)			
Arm roast	3.3		
Cured picnics	4.9		
Trimmings	4.8		
Skin, fat, bone		3.4	
Total	13.0	3.4	16.4
MISCELLANEOUS (33.4 lbs)			
Jowls, feet, tail, neckbones, etc.	9.0		
Trimmings	9.3		
Fat, skin, bone		12.1	
Shrink and loss		3.0	
Total	18.3	15.1	33.4
TOTAL	139.2	32.8	172.0

Source: Derived by AMI from USDA and industry figures
**Retail cuts on semi-boneless basis. Fully boneless would show lower retail weight.*

Composition of Commercial Cattle Slaughter, 1960–90

	STEERS & HEIFERS		COWS	BULLS & STAGS	TOTAL	STEERS & HEIFERS		COWS	BULLS & STAGS
	Fed	Nonfed				Fed	Nonfed		
	Thousand Head					Percent			
1960	13,496	5,602	5,773	353	25,224	53.5%	22.2%	22.9%	1.4%
1961	14,545	5,585	5,179	326	25,635	56.7	21.8	20.2	1.3
1962	15,365	4,981	5,453	284	26,083	58.9	19.1	20.9	1.1
1963	16,844	4,914	5,229	245	27,232	61.9	18.0	19.2	.9
1964	18,261	5,681	6,524	352	30,818	59.3	18.4	21.2	1.1
1965	18,851	4,920	8,074	502	32,347	58.2	15.2	25.0	1.6
1966	20,551	5,101	7,556	519	33,737	60.9	15.1	22.4	1.5
1967	21,847	4,796	6,757	469	33,869	64.5	14.2	20.0	1.4
1968	23,668	3,972	6,843	543	35,026	67.6	11.3	19.5	1.6
1969	24,911	2,824	6,920	582	35,237	70.7	8.0	19.6	1.6
1970	25,725	2,606	6,116	578	35,025	73.5	7.4	17.5	1.6
1971	26,127	2,450	6,375	633	35,585	73.4	6.9	17.9	1.8
1972	27,728	1,414	5,992	645	35,779	77.5	4.0	16.7	1.8
1973	26,083	680	6,248	676	33,687	77.5	2.0	18.5	2.0
1974	23,994	4,484	7,514	820	36,812	65.2	12.2	20.4	2.2
1975	21,260	6,997	11,557	1,097	40,911	52.0	17.1	28.2	2.7
1976	25,125	5,912	10,619	998	42,654	58.9	13.9	24.9	2.3
1977	25,969	5,120	9,864	903	41,856	62.0	12.2	23.6	2.2
1978	27,850	2,434	8,470	798	39,552	70.4	6.2	21.4	2.0
1979	25,566	1,553	5,930	629	33,678	75.9	4.6	17.6	1.9
1980	24,004	2,745	6,334	724	33,807	71.0	8.1	18.7	2.2
1981	23,818	3,717	6,643	775	34,953	68.2	10.6	19.0	2.2
1982	24,902	2,769	7,354	818	35,843	69.5	7.7	20.5	2.3
1983	25,752	2,492	7,597	808	36,649	70.3	6.8	20.7	2.2
1984	25,758	2,415	8,622	787	37,582	68.5	6.4	22.9	2.1
1985	26,181	1,964	7,390	758	36,293	72.1	5.4	20.4	2.1
1986	26,235	2,378	7,961	714	37,288	70.4	6.4	21.4	1.9
1987	26,429	1,919	6,610	689	35,647	74.1	5.4	18.5	1.9
1988	26,799	1,299	6,337	644	35,079	76.4	3.7	18.1	1.8
1989	26,188	756	6,316	658	33,917	77.2	2.2	18.6	1.9
1990	25,730	947	5,920	645	33,242	77.4	2.8	17.8	1.9

Source: U.S. Department of Agriculture

Federally Inspected Calf Slaughter by Class, 1986–90

	BOB VEAL	FED		OTHER	
	150 lbs & Below	Formula 150–400 lbs	Non-formula 150–400 lbs	Over 400 lbs	Total
		Thousand Head			
1986	1,619	1,009	286	281	3,195
1987	1,208	1,003	171	298	2,680
1988	1,066	1,003	156	185	2,411
1989	884	918	110	190	2,100
1990	657	851	99	135	1,742

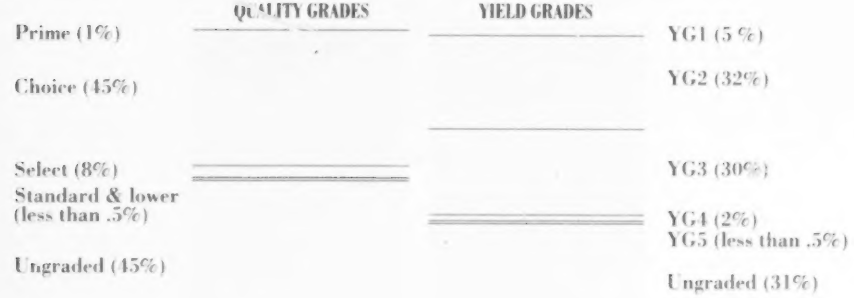
Source: U.S. Department of Agriculture
Totals may not add due to rounding

Beef Quality and Yield Graded, 1980–81 and 1983–90

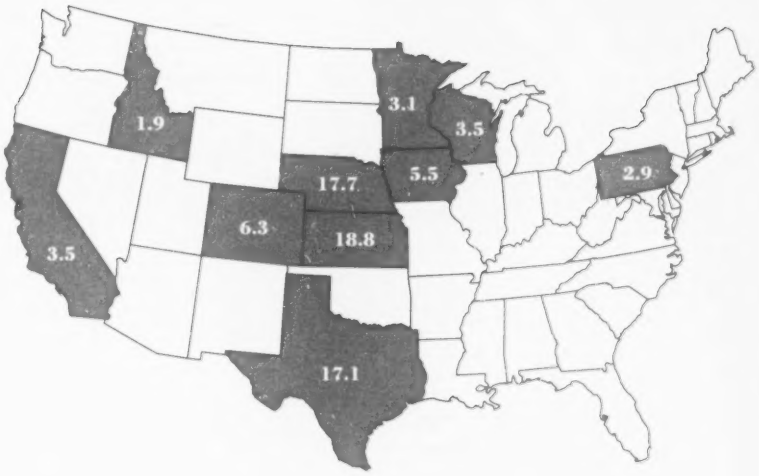
	1980	1981[1]	1983[1]	1984	1985	1986	1987	1988	1989	1990
	Million Pounds									
QUALITY GRADED										
Prime	722	624	472	363	456	400	383	380	335	256
Choice	10,800	10,954	11,152	10,829	11,875	12,053	11,463	11,598	11,106	10,172
Good/Select	516	431	423	430	386	344	266	579	1,434	1,907
Standard	26	16	13	12	11	6	3	2	1	1
Commercial	19	19	13	8	8	3	2	1	1	2
Utility	50	67	48	43	35	20	15	10	11	11
Cutter and Canner	4	7	1	1	4	1	1	1	5	*
Total	12,137	12,118	12,121	11,686	12,774	12,827	12,132	12,571	12,894	12,348
YIELD GRADED										
Grade #1	200	229	275	406	461	507	448	456	787	1,164
Grade #2	3,502	3,671	4,221	4,923	5,195	5,360	5,048	5,052	6,403	7,134
Grade #3	7,088	6,928	6,672	5,767	6,387	6,286	5,989	6,275	7,097	6,799
Grade #4	1,179	1,140	856	550	667	621	593	717	644	480
Grade #5	170	149	97	40	63	53	53	71	60	39
Total	12,137	12,118	12,121	11,686	12,774	12,827	12,132	12,571	14,992	15,617
TOTAL COMMERCIAL BEEF PRODUCTION	21,170	22,214	23,058	23,116	23,557	24,213	23,405	23,425	22,975	22,634

Source: U.S. Department of Agriculture
[1]1982 Not Available; 1983 estimated by U.S.D.A.
****Less than 500,000 lbs.***

Percentage of Beef Graded, 1990



Top 10 Cattle Slaughtering States, by Percentage of Commercial Cattle Slaughter, 1990



TOP 10 CATTLE SLAUGHTERERS IN 1989 (RANKED ALPHABETICALLY)

American Foods Group
BeefAmerica Operating Co., Inc.
ConAgra, Inc.
Excel Corp.
Hyplains Beef Co., Inc.
IBP, Inc.
John Morrell & Co.
National Beef Packing Co.
Packerland Packing Co., Inc.
Sara Lee Corp.

Note: Illinois not included in Top 10 Cattle Slaughtering States because slaughter data not available. If data were available, Illinois would be included and Idaho wouldn't be.

Top 10 Hog Slaughtering States, by Percentage of Commercial Hog Slaughter, 1990

TOP 10 HOG SLAUGHTERERS IN 1989 (RANKED ALPHABETICALLY)

ConAgra, Inc.
Cornbelt Meats
Excel Corp.
Farmland Foods, Inc.
FDL Foods, Inc.
IBP, Inc.
John Morrell & Co.
Sara Lee Corp.
Smithfield Foods, Inc.
Thorn Apple Valley, Inc.

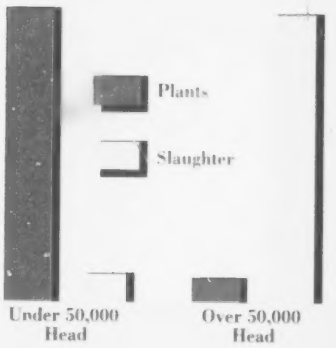
Source: U.S. Department of Agriculture

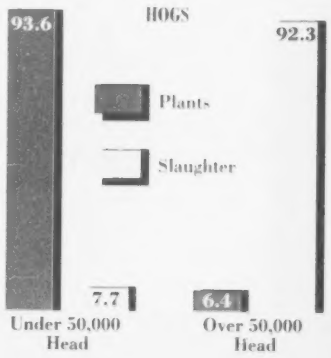
Federally Inspected Slaughter Plants, by Species and by Plant Size, 1990

SIZE GROUPS	PLANTS		SLAUGHTER	
	Number	Percent of Total	Thous. Head	Percent of Total*
CATTLE				
Under 1,000	793	71.8%	209	.6%
1,000–9,999	153	13.8	521	1.6
10,000–49,999	68	6.2	1,678	5.0
50,000–499,999	73	6.6	12,885	10.0
500,000 and over	18	1.6	17,021	51.2
Total	1,105	100.0		
CALVES				
Under 100	346	73.8	5	.3
100–9,999	78	16.6	148	8.3
10,000 and over	45	9.6	1,582	88.4
Total	469	100.0		
HOGS				
Under 1,000	676	65.8	198	.2
1,000–9,999	198	19.3	642	.8
10,000–99,999	88	8.6	3,248	3.8
100,000–999,999	35	3.4	13,042	15.3
1,000,000–1,499,000	9	.9	11,637	13.7
1,500,000 and over	22	2.1	53,890	63.3
Total	1,028	100.0		
SHEEP AND LAMBS				
Under 100	541	66.4	15	.3
100–999	185	22.7	57	1.0
1,000–9,999	59	7.2	180	3.2
10,000 and over	30	3.7	5,203	92.0
Total	815	100.0		

Source: U.S. Department of Agriculture
**Percent of U.S. commercial slaughter*
Totals may not add due to rounding

Percent of F.I. Plants and Slaughter by Size of Plant





Large Plants—Number and Slaughter, 1981–90

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
CATTLE—50,000 or more										
Number of Plants	129	134	135	136	118	114	113	106	96	91
Percent of all F.I. Plants	8.3%	8.9%	8.9%	9.1%	8.1%	8.3%	8.6%	8.5%	8.0%	8.2%
Slaughter, ths. head	27,572	28,697	29,981	31,305	30,532	31,815	30,826	31,320	30,404	29,906
Percent of Commercial Slaughter	78.9%	80.0%	81.8%	83.3%	84.1%	85.3%	90.7%	89.3%	89.7%	91.2%
HOGS—100,000 or more										
Number of Plants	110	101	104	99	72	79	87	67	77	66
Percent of all F.I. Plants	7.9%	7.5%	7.8%	7.4%	5.5%	6.3%	7.4%	5.8%	6.9%	6.4%
Slaughter, ths. head	83,095	74,449	80,351	77,676	74,612	72,444	74,135	81,510	82,535	78,569
Percent of Commercial Slaughter	90.7%	90.7%	91.8%	91.2%	88.3%	91.0%	94.9%	92.8%	91.9%	92.3%

Source: U.S. Department of Agriculture

Number of Livestock Slaughtering Plants, January 1, 1990 and 1991, by State

	JANUARY 1, 1990			JANUARY 1, 1991		
	Federally Inspected Plants	Other Plants	Total	Federally Inspected Plants	Other Plants	Total
NORTH ATLANTIC						
New England[1]	43	42	85	45	48	93
New York	72	9	81	71	9	80
New Jersey	17	7	24	17	7	24
Pennsylvania	202	65	267	196	51	247
NORTH CENTRAL						
Ohio	25	195	220	24	187	211
Indiana	20	115	135	18	112	130
Illinois	30	170	200	26	163	189
Michigan	59	35	94	53	65	118
Wisconsin	18	160	178	18	150	168
Minnesota	44	169	213	41	163	204
Iowa	29	247	276	29	229	258
Missouri	89	135	224	89	135	224
South Dakota	10	104	114	10	97	107
North Dakota	16	42	58	16	40	56
Nebraska	49	140	189	52	134	186
Kansas	17	150	167	15	151	166
SOUTH ATLANTIC						
Delaware/Maryland	11	37	48	10	35	45
Virginia	25	57	82	19	48	67
West Virginia	3	49	52	4	45	49
North Carolina	23	77	100	21	82	103
South Carolina	9	42	51	8	42	50
Georgia	24	100	124	22	79	101
Florida	5	83	88	4	70	74
SOUTH CENTRAL						
Kentucky	38	54	92	36	65	101
Tennessee	42	61	103	34	61	95
Alabama	7	145	152	7	143	150
Mississippi	10	72	82	9	70	79
Arkansas	46	31	77	42	30	72
Louisiana	2	111	113	2	103	105
Oklahoma	17	102	119	13	108	121
Texas	60	205	265	47	170	217
MOUNTAIN						
Montana	23	47	23	18	47	65
Idaho	21	8	21	20	8	28
Wyoming	2	28	30	1	28	29
Colorado	32	26	58	30	23	53
New Mexico	9	26	35	9	26	35
Arizona	5	20	25	3	19	22
Utah	14	21	35	13	19	32
Nevada	5	7	12	5	0	5
PACIFIC						
Washington	21	4	25	21	4	25
Oregon	29	12	41	26	11	37
California	41	59	100	38	52	90
Hawaii	4	12	16	4	11	15
TOTAL U.S.	**1,268**	**3,281**	**4,549**	**1,186**	**3,140**	**4,326**

Source: U.S. Department of Agriculture
[1]Maine, New Hampshire, Vermont, Massachusetts, Rhode Island and Connecticut

Slaughter and Number of Plants, by Species and by State, 1990

	CATTLE		CALVES		HOGS		SHEEP & LAMBS	
	Commercial Slaughter Ths. Head*	No. of F.I. Plants*	Commercial Slaughter Ths. Head*	No. of F.I. Plants*	Commercial Slaughter Ths. Head*	No. of F.I. Plants*	Commercial Slaughter Ths. Head*	No. of F.I. Plants*
Alabama	263.9	5	.2	—	132.0	7	—	—
Arizona	344.2	4	—	—	13.6	—	1.5	3
Arkansas	35.9	14	—	—	234.6	16	.7	28
California	1,172.4	56	92.1	16	1,858.6	21	—	—
Colorado	2,078.6	31	.1	—	44.0	26	1,558.2	28
Delaware-Maryland	45.1	10	31.3	7	218.4	6	22.8	9
Florida	144.3	5	74.7	3	79.2	—	1.3	—
Georgia	235.6	14	123.8	3	—	—	1.3	9
Hawaii	54.5	1	1.7	—	42.6	—	1.0	—
Idaho	641.3	23	.3	3	87.8	20	5.1	18
Illinois	—	—	129.1	4	8,834.3	19	267.4	6
Indiana	108.5	13	136.0	7	3,623.6	17	27.4	11
Iowa	1,830.3	14	—	—	25,785.0	23	395.9	4
Kansas	6,258.5	14	—	—	810.6	16	141.1	7
Kentucky	112.0	32	—	—	—	—	13.6	26
Louisiana	10.3	—	47.8	—	62.4	—	6.6	—
Michigan	—	—	54.9	28	3,635.9	43	291.1	42
Minnesota	1,045.0	39	1.2	15	5,877.5	37	59.9	30
Mississippi	—	—	26.4	3	1,884.9	7	—	—
Missouri	327.4	39	3.9	15	2,797.9	82	24.4	65
Montana	28.1	25	—	—	25.1	23	3.6	21
Nebraska	5,882.3	47	—	—	5,401.1	36	1.4	28
Nevada	1.3	5	—	—	2.1	4	2.7	5
New England	54.1	10	89.9	38	47.5	10	32.6	42
New Jersey	20.5	16	27.2	16	84.5	12	70.6	16
New Mexico	134.6	7	—	—	5.6	6	187.6	7
New York	66.3	74	279.6	55	57.8	64	105.1	68
North Carolina	135.1	14	2.6	7	2,748.7	19	1.1	10
North Dakota	168.5	18	—	—	97.1	18	1.2	16
Ohio	233.2	16	88.0	8	2,575.1	17	30.2	8
Oklahoma	64.2	14	2.8	—	141.8	13	2.4	8
Oregon	63.7	26	6.2	10	133.0	23	8.3	22
Pennsylvania	961.7	187	234.6	119	—	—	119.7	138
South Carolina	110.3	7	5.5	3	646.1	7	—	—
South Dakota	569.3	8	—	—	1,416.2	7	146.9	3
Tennessee	—	—	—	—	309.0	42	.9	22
Texas	5,681.1	47	80.1	13	333.9	31	626.1	26
Utah	176.6	14	.5	—	269.9	14	44.7	12
Virginia	—	—	1.6	12	1,550.6	21	14.1	12
Washington	—	—	49.5	9	19.1	13	190.1	13
West Virginia	16.1	3	9.1	—	19.5	3	.9	—
Wisconsin	1,149.2	14	297.0	8	357.9	9	10.6	6
Wyoming	5.8	—	—	—	5.7	—	2.1	—
TOTAL U.S.	33,242.2	1,105	1,789.6	469	85,135.5	1,028	5,653.7	815

Source: U.S. Department of Agriculture

**Numbers in column will not add to total because of states left blank to avoid disclosing individual operations*

†Operating under State Inspection Programs

‡Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont

Livestock Slaughter Shares by Company Size[1], 1975–89

	STEERS & HEIFERS[2]	COWS & BULLS[2]	ALL CATTLE	CALVES	HOGS	SHEEP & LAMBS
	Percent of Commercial Slaughter					
4 LARGEST COMPANIES						
1975	25.3%	10.5%	19.3%	24.6%	33.1%	57.5%
1976	25.1	11.3	19.6	25.3	32.3	53.6
1977	26.9	9.6	20.2	25.0	32.6	52.8
1978	29.6	10.0	22.9	28.2	34.1	56.1
1979	34.5	9.7	27.9	30.5	33.7	64.2
1980	35.7	9.7	28.4	31.0	33.6	55.9
1981	39.6	9.6	31.1	28.6	33.3	52.5
1982	41.1	9.0	32.0	27.8	35.8	43.6
1983	46.6	10.3	36.0	28.2	29.1	43.8
1984	49.5	11.0	37.2	28.8	35.0	48.9
1985	50.3	17.2	39.0	31.1	32.2	51.2
1986	55.1	18.1	42.3	26.5	32.5	54.3
1987	67.1	20.0	54.2	30.1	36.6	75.1
1988	69.7	18.1	56.6	32.6	33.5	76.5
1989	69.5	17.5	57.0	33.6	37.0	73.7
8 LARGEST COMPANIES						
1975	37.6	17.8	29.3	37.1	49.8	76.0
1976	36.2	18.7	28.6	37.2	48.5	75.1
1977	39.5	16.0	30.5	36.9	50.9	74.0
1978	41.2	17.6	32.5	41.9	52.8	77.5
1979	47.8	17.5	39.1	45.8	50.9	84.5
1980	51.1	18.1	41.3	44.9	50.9	82.8
1981	53.8	18.1	43.1	41.6	49.0	79.5
1982	56.1	17.1	45.6	41.8	53.2	73.6
1983	57.7	19.1	44.5	42.1	46.0	73.8
1984	60.5	19.1	45.5	42.5	53.1	76.0
1985	63.8	27.0	49.6	42.6	50.8	80.2
1986	68.2	28.9	52.9	38.0	53.6	81.5
1987	75.9	30.1	62.9	42.2	55.3	87.6
1988	79.7	30.3	65.9	45.7	52.2	86.7
1989	80.6	30.3	66.0	47.9	52.1	87.1
20 LARGEST COMPANIES						
1975	53.7	30.8	43.0	55.0	68.3	94.1
1976	50.7	32.9	41.6	56.0	66.1	95.5
1977	56.9	30.1	44.1	56.3	69.9	91.1
1978	58.3	33.1	46.3	59.3	71.3	91.8
1979	63.1	34.9	51.8	64.0	69.1	95.8
1980	64.1	35.2	52.2	62.5	71.2	95.7
1981	69.6	37.0	56.1	58.1	69.0	89.0
1982	70.6	33.7	56.3	59.0	74.7	86.1
1983	71.7	36.9	57.2	59.6	68.8	88.9
1984	75.1	36.3	59.2	60.5	79.6	93.2
1985	78.1	45.1	65.0	62.0	80.5	94.9
1986	80.6	46.7	66.9	59.0	84.0	90.1
1987	85.7	50.6	73.5	65.1	81.2	92.3
1988	88.6	51.6	75.9	70.9	77.8	90.3
1989	89.1	53.0	76.1	70.2	78.3	92.5

Source: U.S. Department of Agriculture
[1]Slaughter operations are combined on the basis of ownership and/or control
[2]Commercial slaughter estimated from federally inspected slaughter

Boxed Beef and Total Red Meat Production Shares by Company Size[1], 1975–89

	BOXED BEEF PRODUCTION	TOTAL RED MEAT PRODUCTION
	Percent of Commercial Production	
4 LARGEST COMPANIES		
1975	N.A.	22.4%
1976	N.A.	21.5
1977	N.A.	22.0
1978	N.A.	23.4
1979	51.3	25.2
1980	52.9	25.1
1981	57.1	25.4
1982	59.1	26.4
1983	60.2	28.1
1984	61.7	30.8
1985	61.5	32.0
1986	67.4	34.1
1987	79.5	44.1
1988	79.3	45.5
1989	79.2	47.1
8 LARGEST COMPANIES		
1975	N.A.	32.6
1976	N.A.	31.9
1977	N.A.	33.3
1978	N.A.	36.0
1979	65.1	39.0
1980	67.9	38.5
1981	71.1	39.2
1982	73.7	40.0
1983	73.6	38.9
1984	75.7	41.8
1985	78.7	42.2
1986	85.2	44.7
1987	88.6	53.2
1988	88.7	54.4
1989	88.2	55.2
20 LARGEST COMPANIES		
1975	N.A.	45.9
1976	N.A.	44.4
1977	N.A.	47.5
1978	N.A.	49.2
1979	82.3	52.7
1980	84.1	54.1
1981	86.3	53.8
1982	87.7	55.4
1983	87.6	53.9
1984	90.6	59.1
1985	93.2	62.3
1986	95.0	64.5
1987	95.4	68.7
1988	95.1	69.7
1989	94.7	70.2

Source: U.S. Department of Agriculture
[1]Companies are combined on the basis of ownership and/or control.
N.A.—Not Available

Top 20 Meat Companies (Ranked by 1990 Sales)

COMPANY & LOCATION	1990 SALES (MIL $)	SLAUGHTER	PROCESSING	BEEF	PORK	POULTRY
1. Con Agra, Inc. ..... Omaha, NE	$12,500	*	*	*	*	*
2. IBP, Inc. ..... Dakota City, NE	10,185	*	*	*	*	
3. Excel Corporation ..... Wichita, KS	5,500	*	*	*	*	
4. Tyson Foods, Inc. ..... Springdale, AR	3,825	*	*	*	*	*
5. Sara Lee Corporation..... Cordova, TN	3,000	*	*	*	*	*
6. Geo. A. Hormel & Co. ..... Austin, MN	2,681	*	*	*	*	*
7. Oscar Mayer Foods Corp ... Madison, WI	2,500		*	*	*	*
8. John Morrell & Co. ..... Cincinnati, OH	2,100	*	*	*	*	*
9. BeefAmerica, Operating Co., Inc. ..... Omaha, NE	1,800	*	*	*		
10. International Multifoods U.S. Foodservice Group..... Minneapolis, MN	1,500		*	*	*	*
11. Perdue Farms, Inc. ..... Salisbury, MD	1,250	*	*			*
12. Idle Wild Foods, Inc. ..... Liberal, KS	1,233	*	*	*		
13. Gold Kist, Inc. ..... Atlanta, GA	1,040	*	*			
14. Doskocil Cos., Inc. ..... Hutchinson, KS	919	*	*	*	*	*
15. Smithfield Foods, Inc. ..... Smithfield, VA	853	*	*	*	*	*
16. Hyplains Beef Co., Inc. ..... Dodge City, KS	734	*		*		
17. American Foods Group ..... Green Bay, WI	729	*	*	*	*	
18. FDL Foods, Inc. ..... Dubuque, IA	725	*	*		*	
19. Pilgrim's Pride Corp. ..... Pittsburg, TX	721	*	*			*
20. Farmland Foods, Inc..... Kansas City, MO	715	*	*		*	*

Source: Meat & Poultry magazine

Top 10 Meat Companies in 1990

COMPANY	SALES (MIL $)
ConAgra, Inc.	$12,500
IBP, Inc.	10,185
Excel Corp.	5,500
Tyson Foods, Inc.	3,825
Sara Lee Corp.	3,000
Geo. A. Hormel & Co.	2,681
Oscar Mayer Foods Corp.	2,500
John Morrell & Co.	2,100
BeefAmerica Operating Co., Inc.	1,800
International Multifoods	1,500

...and in 1980

COMPANY	SALES (MIL $)
Iowa Beef Processors, Inc.	$4,639
Armour & Co.	3,241
Swift & Co.	2,500
Wilson Foods Corp.	2,340
John Morrell & Co.	2,241
Swift Independent Packing Co.	2,000
Oscar Mayer & Co.	1,774
MBPXL Corp.	1,332
Geo. A. Hormel & Co.	1,321
Land O'Lakes	1,220

Source: Meat & Poultry magazine

Meat Industry Sales Breakdown by Company Type, 1989

	PACKERS[1]	PROCESSORS[2]
Total Sales	**100.00%**	**100.00%**
Livestock and/or Meat	81.94	55.08
Supplies & Containers	3.27	8.70
Production Labor	4.42	7.40
Cost of Goods Sold	89.63	71.19
Gross Margin	**10.37**	**28.81**
Other Wages and Salaries	2.10	4.70
Employee Benefits:		
Retirement Expense	.14	.39
Payroll Taxes	.59	1.23
Insurance & Hospitalization	.65	1.44
All Other Benefits	.44	1.02
Total Benefits	1.83	4.09
Interest	.42	.40
Depreciation	.74	1.47
Rents	.17	.45
General & Administrative Insurance	.54	.20
Taxes*	.09	.24
All Other Expenses	2.92	11.70
Total Operating Expenses	**98.44**	**94.44**
Earnings Before Taxes	1.56	5.56
Income Taxes	.34	1.92
Net Earnings	**1.22**	**3.64**

***Source:** American Meat Institute, 1989 Financial Operating Survey of the Meat Industry*

[1, 2]Defined as companies participating in the AMI survey that:

[1]slaughter livestock and have sales primarily of fresh meat;

[2]do not slaughter livestock and are primarily involved in the manufacture and sale of processed meats.

**Other than Social Security and Income Taxes*

Totals may not add due to rounding

Breakdown of Packers' and Packer/Processors' 1989 Sales Dollar by Species Slaughtered

	CATTLE PACKERS OR PACKER/PROCESSORS[1]	HOG PACKERS OR PACKER/PROCESSORS[1]
Total Sales	**100.00%**	**100.00%**
Livestock and/or Meat	89.20	71.10
Supplies & Containers	2.00	5.56
Production Labor	2.75	6.60
Cost of Goods Sold	93.95	83.26
Gross Margin	**6.05**	**16.74**
Other Wages and Salaries	1.54	3.09
Employee Benefits:		
Retirement Expense	.04	.30
Payroll Taxes	.35	.95
Insurance & Hospitalization	.28	1.18
All Other Benefits	.11	.71
Total Benefits	.77	3.15
Interest	.37	.54
Depreciation	.45	1.09
Rents	.06	.40
General & Administrative Insurance.	.23	1.01
Taxes*	.05	.13
All Other Expenses	2.22	4.26
Total Operating Expenses	**99.65**	**96.93**
Earnings Before Taxes	.35	3.07
Income Taxes	.19	.47
Net Earnings	**.16**	**2.60**

***Source:** American Meat Institute, 1989 Financial Operating Survey of the Meat Industry*
[1]Refers to participants in AMI survey whose slaughter of identified species represented at least 75% of their total live weight slaughter
**Other than Social Security and Income Taxes*
Totals may not add due to rounding

Employment and Earnings for Meat Packing and Meat Processing Industries Compared with All Food and All Manufacturing

	UNIT	1965	1975	1985	1988	1989	1990
MEAT PACKING							
Total Employees	Thousand	193.3	168.2	140.3	142.2	144.6	139.5
Production Workers	Thousand	149.1	135.7	116.5	119.1	121.1	117.7
Avg. Weekly Earnings	Dollars	$126.18	$234.74	$332.91	$352.35	$357.28	$359.68
Avg. Weekly Hours	Hours	42.4	41.4	41.1	41.6	41.4	41.2
Avg. Hourly Earnings	Dollars	$2.99	$5.67	$8.10	$8.47	$8.63	$8.73
MEAT PROCESSING							
Total Employees	Thousand	52.0	67.2	74.5	80.3	83.2	84.6
Production Workers	Thousand	37.2	47.3	54.6	59.0	61.3	63.1
Avg. Weekly Earnings	Dollars	$114.54	$217.62	$353.10	$368.42	$376.79	$386.68
Avg. Weekly Hours	Hours	41.2	40.6	40.4	40.8	41.0	41.4
Avg. Hourly Earnings	Dollars	$2.78	$5.36	$8.74	$9.03	$9.19	$9.34
ALL FOOD							
Total Employees	Thousand	1,756.7	1,657.5	1,602.5	1,645.3	1,665.2	1,649.7
Production Workers	Thousand	1,159.1	1,120.3	1,118.1	1,166.3	1,192.1	1,185.9
Avg. Weekly Earnings	Dollars	$99.87	$185.78	$342.80	$368.04	$379.73	$392.90
Avg. Weekly Hours	Hours	41.1	40.3	40.0	40.4	40.7	40.8
Avg. Hourly Earnings	Dollars	$2.43	$4.61	$8.57	$9.11	$9.33	$9.63
ALL MANUFACTURING							
Total Employees	Thousand	18,062.0	18,323.0	19,260.0	19,539.0	19,612.0	19,062.0
Production Workers	Thousand	13,434.0	13,043.0	13,092.0	13,338.0	13,375.0	12,936.0
Avg. Weekly Earnings	Dollars	$107.53	$190.79	$386.37	$418.40	$429.27	$442.27
Avg. Weekly Hours	Hours	41.2	39.5	40.5	41.1	41.0	40.8
Avg. Hourly Earnings	Dollars	$2.61	$4.83	$9.54	$10.18	$10.47	$10.84

Source: U.S. Department of Labor

Injury and Illness Incidence Rates in Meat Packing, 1980–89

Per Hundred Employees

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
Injuries & Illnesses	33.5	32.8	30.7	31.4	33.4	30.4	33.4	38.4	39.2	35.1
Injuries	31.0	29.7	27.7	27.4	29.0	26.3	27.0	30.4	30.1	26.0
Illnesses	2.5	3.1	3.0	4.0	4.4	4.1	6.4	8.0	9.1	9.1

Source: U.S. Department of Labor

Incidence Rates and Lost Workdays in Meat Packing, 1985–89

Per Hundred Employees

	1985	1986	1987	1988	1989
	TOTAL INJURIES AND ILLNESSES				
Total Reportable Cases	30.4	33.4	38.4	39.2	35.1
Lost Workday Cases	15.1	14.7	17.8	19.2	18.3
Non-Lost Workday Cases	15.2	18.7	20.7	20.0	16.9
Lost Workdays	246.1	238.4	339.7	357.0	358.7
	INJURIES				
Total Reportable Cases	26.3	27.0	30.4	30.1	26.0
Lost Workday Cases	13.0	12.2	13.6	14.3	13.1
Non-Lost Workday Cases	13.3	14.8	16.8	15.8	12.9
Lost Workdays	200.3	190.3	241.9	238.3	222.7
	ILLNESSES				
Total Reportable Cases	4.1	6.4	8.0	9.1	9.1
Lost Workday Cases	2.1	2.5	4.1	4.9	5.2
Non-Lost Workday Cases	1.9	3.9	3.9	4.2	4.0
Lost Workdays	45.8	48.1	97.8	118.7	136.0

Source: U.S. Department of Labor

Midwest Wholesale Meat Prices, 1982–90

	1982	1983	1984	1985	1986	1987	1988	1989	1990
	Dollars per Hundred Pounds, Carlot Basis								
Boxed Beef Cutout, Choice, 550–700 lbs.	$105.70	$101.96	$103.80	$97.95	$94.61	$103.84	$110.34	$114.78	$123.21
Boxed Beef Cutout, Select	N.A.	N.A.	N.A.	N.A.	89.21	98.61	103.28	109.54	116.60
Cow Beef, Canner and Cutter	78.96	78.48	74.70	74.13	71.31	83.70	87.64	94.27	99.96
Domestic Boneless Beef, Fresh									
90% Chemical Lean	111.10	108.99	101.13	100.84	98.25	112.20	116.76	126.19	132.72
85% Chemical Lean	105.10	101.79	94.44	94.22	90.92	104.14	107.45	116.68	123.28
50% Chemical Lean	59.04	48.87	53.56	41.71	43.63	50.66	43.42	52.10	58.51
Fresh Pork Loins, 14–18 lbs.	109.71	97.29	96.36	91.51	104.78	106.23	97.48	100.74	117.52
Pork Bellies, 12–14 lbs.	76.54	61.72	60.19	59.50	65.82	63.11	41.25	33.91	53.80
Hams, Skinned, 17–20 lbs.	90.22	73.99	75.41	67.27	77.96	79.29	69.04	69.12	84.87

Source: U.S. Department of Agriculture and National Provisioner Daily Market & News Service
N.A.—Not Available

Producer Price Indices, 1982–90

	1982	1983	1984	1985	1986	1987	1988	1989	1990
	1982=100								
Total Finished Goods	100.0	101.6	103.7	104.7	103.2	105.4	108.0	113.6	119.2
All Commodities	100.0	101.3	103.7	103.2	100.2	102.8	106.9	112.2	116.3
All Meats	100.0	94.3	94.5	90.9	93.9	100.4	99.9	104.8	116.9
Beef and Veal	100.0	96.4	96.7	90.3	88.1	95.5	101.4	108.9	116.0
Pork	100.0	90.6	90.2	89.1	99.9	104.9	95.0	97.7	119.7
Other Meats	100.0	94.3	94.4	94.0	97.4	103.9	101.5	103.7	113.4
Poultry	100.0	103.7	115.3	110.4	116.8	103.5	111.6	120.4	113.6
Fish and Seafood	100.0	105.4	112.7	114.6	124.9	140.0	148.7	142.9	148.6

Source: U.S. Department of Labor

U.S. Average Retail Meat Prices, 1981–90

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
	Dollars Per Pound									
BEEF (Choice Grade)	**$2.35**	**$2.38**	**$2.34**	**$2.36**	**$2.29**	**$2.27**	**$2.38**	**$2.50**	**$2.66**	**$2.81**
Sirloin Steak	2.99	3.06	3.06	3.08	2.96	2.96	3.13	3.29	3.58	3.67
Round Steak	2.86	2.95	2.90	2.91	2.77	2.77	2.89	2.99	3.12	3.32
Round Roast	2.63	2.64	2.55	2.58	2.47	2.44	2.53	2.63	2.76	2.93
Rib Roast	3.03	3.22	3.24	3.35	3.28	3.26	3.54	3.89	4.17	4.49
Chuck Roast	1.82	1.79	1.74	1.68	1.57	1.59	1.68	1.73	1.88	2.09
Ground Chuck	1.80	1.78	1.73	1.72	1.68	1.64	1.71	1.76	1.83	1.97
FRESH PORK	**1.52**	**1.75**	**1.70**	**1.62**	**1.62**	**1.78**	**1.88**	**1.83**	**1.83**	**2.13**
Pork Chops	2.13	2.39	2.37	2.38	2.34	2.59	2.82	2.77	2.85	3.27
Sliced Bacon	1.67	2.05	1.94	1.86	1.94	2.08	2.14	1.88	1.77	2.13
Smoked Picnic	1.04	1.15	1.05	1.01	1.02	1.06	1.12	1.12	1.10	1.28
Canned Ham	2.46	2.65	2.67	2.56	2.56	2.68	2.80	2.73	2.67	2.77
Fresh Pork Sausage	1.61	1.88	1.87	1.71	1.74	1.91	1.99	1.97	2.00	2.35
Frankfurters	1.77	1.82	1.81	1.80	1.81	1.93	1.99	2.02	2.06	2.29
Bologna	2.11	2.21	2.18	2.13	2.11	2.17	2.19	2.24	2.28	2.51
POULTRY										
Whole Broilers	.74	.72	.73	.81	.76	.84	.78	.85	.93	.90
Frozen Hen Turkeys	.98	.93	.92	.99	1.05	1.07	1.01	.96	.99	.99

Source: U.S. Department of Labor, Bureau of Labor Statistics

Consumer Price Indices, 1982–90

	1982	1983	1984	1985	1986	1987	1988	1989	1990
	1982–84=100								
All Items	96.5	99.6	103.9	107.6	109.6	113.6	118.3	124.0	130.7
All Foods	97.4	99.4	103.2	105.6	109.0	113.5	118.2	125.1	132.4
Food at Home	98.1	99.1	102.8	104.3	107.3	111.9	116.6	124.2	132.3
Food Away	95.8	100.0	104.2	108.3	112.5	117.0	121.8	127.4	133.4
All Meats	100.7	99.5	99.9	98.9	102.0	109.6	112.2	116.7	128.5
Beef and Veal	100.6	99.1	100.3	98.2	98.8	106.3	112.1	119.3	128.8
Pork	101.0	100.1	98.8	99.1	107.2	115.9	112.5	113.2	129.8
Other Meats	100.1	99.7	100.1	100.8	103.4	109.9	112.8	116.0	126.8
Poultry	95.8	97.0	107.3	106.2	114.2	112.6	120.7	132.7	132.5
Fish and Seafood	98.2	99.3	102.5	107.5	117.4	112.9	137.4	143.6	146.7

Source: U.S. Department of Labor

Beef: Retail, Wholesale and Farm Values and Spreads, 1970–90

	VALUES			FARM TO RETAIL SPREAD		
	Retail Price	Wholesale Value*	Farm Value*	Total	Wholesale to Retail	Farm to Wholesale
	Cents Per Pound					
1970	99.9	76.8	64.2	35.7	23.1	12.6
1971	106.2	85.2	70.7	35.5	21.0	14.5
1972	116.6	90.3	76.0	40.6	26.3	14.3
1973	139.7	110.8	94.7	45.0	28.9	16.1
1974	143.8	110.1	91.8	52.0	33.7	18.3
1975	152.2	119.2	99.4	52.8	33.0	19.8
1976	145.7	100.7	84.4	61.3	45.0	16.3
1977	145.8	103.2	86.0	59.8	42.6	17.2
1978	178.8	131.4	111.7	67.1	47.4	19.7
1979	222.4	165.7	141.7	80.7	56.7	24.0
1980	233.6	171.1	145.7	87.9	62.5	25.4
1981	234.7	164.4	139.1	95.6	70.3	25.3
1982	238.4	165.9	141.1	97.3	72.5	24.8
1983	234.1	160.1	136.8	97.3	74.0	23.3
1984	235.5	162.5	140.7	94.8	73.0	21.8
1985	228.6	148.8	127.4	101.2	79.8	21.4
1986	226.8	146.5	125.0	101.8	80.3	21.5
1987	238.4	160.0	138.7	99.7	78.4	21.3
1988	250.3	169.4	148.3	102.0	80.9	21.1
1989	265.7	176.8	157.6	108.1	88.9	19.2
1990	281.0	189.6	168.4	112.6	91.4	21.2

Source: U.S. Department of Agriculture
**Value equivalent to one pound of beef at retail, less by-product value*

Pork: Retail, Wholesale and Farm Values and Spreads, 1970–90

	VALUES			FARM TO RETAIL SPREAD		
	Retail Price	Wholesale Value*	Farm Value*	Total	Wholesale to Retail	Farm to Wholesale
	Cents Per Pound					
1970	77.4	63.4	39.3	38.1	14.0	24.1
1971	69.8	57.0	32.0	37.8	12.8	25.0
1972	82.7	71.3	46.2	36.5	11.4	25.1
1973	109.2	99.8	67.6	41.6	13.4	28.2
1974	107.8	85.5	57.2	50.6	22.3	28.3
1975	134.6	115.3	79.8	54.8	19.3	35.5
1976	134.0	105.2	71.0	63.0	28.8	34.2
1977	125.4	99.0	65.6	59.8	26.4	33.4
1978	143.6	107.7	76.6	67.0	35.9	31.1
1979	144.1	100.4	66.6	77.5	43.7	33.8
1980	139.4	98.0	63.2	76.2	41.4	34.8
1981	152.4	106.7	70.3	82.1	45.7	36.4
1982	175.4	121.8	88.0	87.4	53.6	33.8
1983	169.8	108.9	76.5	93.3	60.9	32.4
1984	162.0	110.1	77.4	84.6	51.9	32.7
1985	162.0	101.1	71.4	90.6	60.9	29.7
1986	178.4	110.9	82.4	96.0	67.5	28.5
1987	188.4	113.0	82.7	105.7	75.4	30.3
1988	183.4	101.0	69.4	114.0	82.4	31.6
1989	182.9	99.2	70.4	112.5	83.7	28.8
1990	212.6	118.3	87.2	125.4	94.3	31.1

Source: U.S. Department of Agriculture
**Value equivalent to one pound of retail cuts, less by-product value*

Hamburger and Beef: Disappearance and Prices, 1970–90

	PER CAPITA DISAPPEARANCE				PRICES	
	Hamburger	Processed Beef[1]	Beef Cuts	Total Beef	Hamburger[2]	Choice Beef
	Pounds Retail				Dollars Per Pound	
1970	21.9	10.8	51.9	84.6	$.66	$1.00
1971	22.1	10.4	51.5	84.0	.68	1.06
1972	22.4	10.0	53.3	85.7	.74	1.17
1973	21.9	9.4	49.4	80.7	.96	1.40
1974	24.7	10.1	50.8	85.6	.97	1.44
1975	30.1	11.7	46.4	88.2	.88	1.52
1976	30.5	11.3	52.7	94.5	.88	1.46
1977	28.4	10.0	53.2	91.6	.85	1.46
1978	27.2	9.1	51.1	87.4	.99	1.79
1979	23.6	7.4	47.1	78.1	1.32	2.22
1980	24.7	7.4	44.5	76.6	1.36	2.34
1981	25.3	7.1	44.8	77.2	1.33	2.35
1982	26.5	7.0	43.4	76.9	1.32	2.38
1983	26.6	6.6	45.2	78.4	1.29	2.34
1984	27.6	6.4	44.2	78.2	1.28	2.36
1985	27.3	5.9	45.7	78.9	1.24	2.29
1986	29.4	6.0	43.1	78.5	1.23	2.27
1987	29.1	5.6	38.8	73.5	1.31	2.38
1988	28.9	5.1	38.3	72.3	1.36	2.50
1989	28.3	5.0	36.0	69.3	1.44	2.66
1990	28.5	5.1	34.2	67.8	1.59	2.81

Source: Consumption data derived by AMI from government data; price data from U.S. Department of Labor
[1]Includes beef sausage, bologna, and luncheon meats but excludes cured briskets and cooked beef
[2]1978–83 estimated based on Consumer Price Index for ground beef

Per Capita Disappearance of Red Meat, Carcass & Retail Weight Basis, 1960–90

	BEEF		VEAL		PORK		LAMB & MUTTON		TOTAL RED MEAT	
	Carcass	Retail	Carcass	Retail	Carcass	Retail	Carcass	Retail	Carcass	Retail
1960	85.7	63.4	6.2	5.0	78.3	59.1	4.7	4.2	174.9	131.7
1961	88.5	65.5	5.8	4.6	75.0	56.7	5.0	4.5	174.3	131.3
1962	89.5	66.2	5.6	4.5	75.7	57.3	5.1	4.5	175.8	132.5
1963	94.9	70.2	5.0	4.0	77.0	58.3	4.8	4.3	181.7	136.8
1964	101.1	74.8	5.4	4.3	76.9	58.4	4.2	3.7	187.5	141.2
1965	101.0	74.7	5.4	4.3	68.1	51.8	3.7	3.3	178.2	134.1
1966	105.8	78.3	4.7	3.8	66.6	50.7	4.0	3.5	181.1	136.3
1967	108.1	80.0	4.1	3.2	72.8	55.5	3.9	3.4	188.8	142.1
1968	111.0	82.2	3.8	3.0	74.3	56.7	3.7	3.3	192.9	145.2
1969	111.8	82.7	3.4	2.7	72.0	55.0	3.5	3.1	190.6	143.5
1970	114.4	84.6	3.0	2.4	73.1	56.0	3.3	2.9	193.8	145.9
1971	113.5	84.0	2.7	2.2	79.2	60.6	3.2	2.8	198.5	149.6
1972	115.8	85.7	2.3	1.9	71.3	54.7	3.3	2.9	192.8	145.2
1973	109.0	80.7	1.8	1.5	63.8	49.0	2.7	2.4	177.3	133.6
1974	115.7	85.6	2.4	1.9	68.7	52.8	2.3	2.0	189.1	142.3
1975	119.2	88.2	4.2	3.3	55.9	43.0	2.0	1.8	181.2	136.3
1976	127.7	94.5	4.0	3.2	59.1	45.5	1.8	1.6	192.6	144.8
1977	123.8	91.6	3.9	3.1	60.9	47.0	1.7	1.5	190.3	143.2
1978	118.1	87.4	2.9	2.4	60.8	47.0	1.6	1.4	183.4	138.2
1979	105.6	78.1	2.0	1.6	69.4	53.7	1.5	1.3	178.5	134.7
1980	103.4	76.6	1.8	1.5	74.0	57.3	1.5	1.4	180.8	136.8
1981	104.3	77.2	2.0	1.6	70.5	54.7	1.6	1.4	178.4	134.9
1982	104.0	76.9	2.0	1.6	63.2	49.1	1.7	1.5	170.8	129.1
1983	105.9	78.4	2.0	1.6	66.3	51.6	1.7	1.5	175.9	133.1
1984	105.7	78.2	2.2	1.7	65.9	51.3	1.7	1.5	175.4	132.7
1985	106.7	78.9	2.2	1.8	66.3	51.7	1.6	1.4	176.8	133.8
1986	107.6	78.5	2.3	1.8	62.7	48.8	1.6	1.4	174.1	130.5
1987	103.5	73.5	1.8	1.5	63.0	49.0	1.5	1.3	169.9	125.3
1988	102.5	72.3	1.7	1.4	67.2	52.2	1.6	1.4	173.0	127.3
1989	98.4	69.3	1.4	1.2	67.0	52.0	1.6	1.5	168.4	124.0
1990	96.1	67.8	1.3	1.1	64.1	49.8	1.7	1.5	163.2	120.1

Source: U.S. Department of Agriculture

Per Capita Disappearance of Poultry, Retail Weight Basis, 1960–90

	BROILERS	OTHER CHICKEN	TOTAL CHICKEN	TURKEY	TOTAL POULTRY
			Pounds		
1960	23.5	4.4	27.9	6.3	34.1
1961	26.0	4.0	30.0	7.4	37.5
1962	25.9	4.1	30.0	7.1	37.1
1963	27.2	3.7	30.9	6.9	37.8
1964	27.8	3.6	31.4	7.4	38.8
1965	29.8	3.8	33.6	7.5	41.2
1966	32.2	3.6	35.8	7.9	43.7
1967	32.6	4.1	36.7	8.7	45.3
1968	32.9	4.0	36.9	8.1	44.9
1969	35.0	3.6	38.5	8.4	46.9
1970	36.9	3.6	40.6	8.1	48.7
1971	36.8	3.8	40.6	8.4	49.0
1972	38.4	3.6	42.0	9.0	51.0
1973	37.4	3.3	40.7	8.5	44.2
1974	37.4	3.5	41.0	8.8	49.8
1975	37.1	3.4	40.4	8.5	48.9
1976	40.2	2.8	43.1	9.1	52.2
1977	41.4	3.1	44.4	9.1	53.5
1978	44.1	3.0	47.0	9.2	56.2
1979	48.0	3.0	51.0	9.9	60.9
1980	47.4	3.1	50.5	10.5	61.0
1981	48.9	3.1	52.0	10.8	62.8
1982	50.2	3.1	53.3	10.8	64.1
1983	51.0	3.1	54.1	11.3	65.3
1984	53.2	2.6	55.8	11.4	67.2
1985	55.7	2.5	58.2	12.1	70.3
1986	56.9	2.5	59.4	13.3	72.7
1987	60.8	2.5	63.3	15.2	78.5
1988	62.5	2.6	65.2	15.9	81.1
1989	67.1	2.1	69.2	17.2	86.4
1990	70.1	2.0	72.1	18.2	90.3

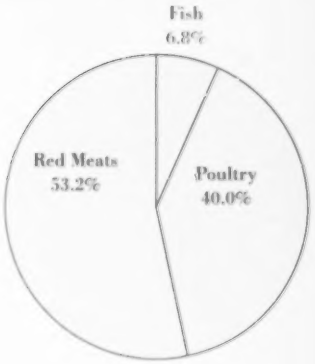
Source: U.S. Department of Agriculture

Per Capita Disappearance of Red Meat, Poultry & Fish, Retail Weight Basis, 1960–90

	TOTAL RED MEAT	POULTRY	FISH	TOTAL RED MEAT, POULTRY AND FISH
		Pounds		
1960	131.7	34.1	10.3	176.1
1961	131.3	37.5	10.7	179.5
1962	132.5	37.1	10.6	180.2
1963	136.8	37.8	10.7	185.3
1964	141.2	38.8	10.5	190.5
1965	134.1	41.2	10.8	186.1
1966	136.3	43.7	10.9	190.9
1967	142.1	45.3	10.6	198.0
1968	145.2	44.9	11.0	201.1
1969	143.5	46.9	11.2	201.6
1970	145.9	48.7	11.8	206.4
1971	149.6	49.0	11.5	210.1
1972	145.2	51.0	12.5	208.7
1973	133.6	49.2	12.8	195.6
1974	142.3	49.8	12.1	204.2
1975	136.3	48.9	12.2	197.4
1976	144.8	52.2	12.9	209.9
1977	143.2	53.5	12.7	209.4
1978	138.2	56.2	13.4	207.8
1979	134.7	60.9	13.0	208.6
1980	136.8	61.0	12.8	210.6
1981	134.9	62.8	12.9	210.6
1982	129.1	64.1	12.3	205.5
1983	133.1	65.3	13.1	211.5
1984	132.7	67.2	13.7	213.6
1985	133.8	70.3	14.4	218.5
1986	130.5	72.7	14.7	217.9
1987	125.3	78.5	15.4	219.2
1988	127.3	81.1	15.2	223.6
1989	124.0	86.4	15.6	226.0
1990	120.1	90.3	15.5	225.9

Source: U.S. Department of Agriculture

Meat Consumption Shares 1990



Consumer Expenditures for Food at Home and Away, and as a Percent of Disposable Personal Income, 1970–90

	FOOD EXPENDITURES			EXPENDITURES AS PERCENT OF DISPOSABLE PERSONAL INCOME		
	At Home	Away From Home	Total	At Home	Away From Home	Total
	Million Dollars					
1970	$77,527	$39,583	$117,110	10.8%	5.5%	16.4%
1971	81,446	42,251	123,697	10.5	5.4	15.9
1972	87,933	46,587	134,520	10.5	5.5	16.0
1973	97,286	52,650	149,936	10.2	5.5	15.8
1974	110,252	58,045	168,297	10.6	5.6	16.2
1975	119,850	68,109	187,959	10.5	6.0	16.4
1976	127,835	76,833	204,668	10.2	6.1	16.3
1977	136,559	84,949	221,508	9.9	6.2	16.1
1978	150,355	96,181	246,536	9.7	6.2	15.9
1979	167,483	109,307	276,790	9.7	6.3	16.0
1980	185,638	120,530	306,168	9.7	6.3	16.0
1981	198,520	131,563	330,083	9.3	6.2	15.5
1982	206,184	140,725	346,909	9.1	6.2	15.3
1983	216,762	152,681	369,443	8.9	6.3	15.2
1984	227,641	164,053	391,694	8.5	6.1	14.7
1985	234,592	172,776	407,368	8.3	6.1	14.4
1986	242,366	187,411	429,777	8.0	6.2	14.3
1987	250,289	206,622	456,911	7.8	6.4	14.3
1988	263,332	222,192	485,524	7.6	6.4	14.0
1989	280,118	234,825	514,943	7.5	6.3	13.8
1990	295,305	250,970	546,275	7.5	6.4	13.8

Source: Derived from data provided by U.S. Departments of Agriculture and Commerce

Per Capita Income and Red Meat Expenditures, 1970–90

	Disposable Personal Income	Red Meat[1] Expenditures	RED MEAT EXPENDITURES AS PERCENT OF	
			Disposable Personal Income	Total Food Expenditures
1970	$3,489	$133.90	3.8%	23.3%
1971	3,740	137.57	3.7	23.0
1972	4,000	151.54	3.8	23.6
1973	4,481	172.20	3.8	24.3
1974	4,855	186.63	3.8	23.7
1975	5,291	201.12	3.8	23.1
1976	5,744	207.18	3.6	22.0
1977	6,262	200.72	3.2	19.9
1978	6,968	231.86	3.3	20.9
1979	7,682	258.78	3.4	21.0
1980	8,421	262.06	3.1	19.4
1981	9,243	273.36	3.0	19.0
1982	9,724	278.97	2.9	18.6
1983	10,340	280.66	2.7	17.8
1984	11,257	277.05	2.5	16.7
1985	11,861	273.86	2.3	16.0
1986	12,469	274.93	2.2	15.2
1987	13,140	276.84	2.1	14.7
1988	14,116	286.03	2.0	14.4
1989	14,973	288.76	1.9	13.8
1990	15,695	306.40	2.0	14.0

Source: Derived from data provided by U.S. Departments of Agriculture and Commerce
[1]Beef, veal, pork and lamb. Expenditures for veal and lamb from 1981 onwards estimated by AMI. Expenditures are derived by multiplying consumption by retail price and are understated to the extent they fail to reflect higher-valued expenditures on meats consumed away from home.

Meat Expenditures by Consumer Characteristics, 1989

	BEEF	PORK	OTHER MEATS	POULTRY	FISH	ALL FOODS
BY INCOME						
$ 5,000 – $ 9,999	$2.69	$1.85	$1.03	$1.25	$ .68	$41.54
$10,000 – $14,999	3.21	1.94	1.78	1.55	1.01	52.82
$15,000 – $19,999	3.70	1.89	1.45	1.80	1.44	59.93
$20,000 – $29,999	3.87	2.24	1.77	1.83	1.30	70.00
$30,000 – $39,999	4.80	2.67	2.04	2.14	1.49	84.14
$40,000 –$49,999	4.39	2.27	2.03	2.16	1.63	88.46
$50,000 and over	5.34	2.90	2.39	2.88	2.15	113.38
BY NUMBER OF EARNERS						
Single Consumers						
No Earner	1.57	1.00	.80	1.07	.70	33.60
One Earner	1.37	.80	.66	.79	.56	42.15
Two or More Consumers						
No Earner	4.39	2.79	1.73	2.27	1.65	63.22
One Earner	4.50	2.87	1.87	2.20	1.62	73.75
Two Earners	4.53	2.44	2.08	2.18	1.58	85.86
Three or More	6.58	3.55	2.82	2.90	1.86	109.00
BY SIZE OF CONSUMER UNIT						
One Person	1.44	.87	.71	.89	.61	39.07
Two Persons	3.51	2.19	1.53	1.95	1.44	69.77
Three Persons	4.75	2.94	2.06	2.31	1.73	84.86
Four Persons	6.05	3.04	2.46	2.73	1.86	96.34
Five or more	6.62	3.78	3.38	2.80	1.81	106.94
BY COMPOSITION OF CONSUMER UNIT						
Husband and Wife. All	5.04	2.82	2.20	2.37	1.73	88.77
Oldest Child Aged:						
Under 6	4.36	2.58	1.88	2.06	1.33	84.44
6–17	5.63	3.01	2.61	2.51	1.80	100.01
18 or Over	7.07	3.70	2.84	3.10	2.04	103.59
One Parent With Children Aged Under 18	3.45	2.28	1.64	1.95	1.13	61.09
Others	2.23	1.35	1.02	1.23	.83	47.06
BY REGION						
Northeast	3.95	2.17	1.78	2.42	1.67	75.63
Midwest	3.57	2.32	1.73	1.50	.99	67.50
South	3.71	2.30	1.65	1.76	1.26	67.23
West	4.51	2.10	1.76	2.17	1.65	79.08
BY RACE						
White and Other	3.93	2.13	1.73	1.90	1.33	73.82
Black	3.55	3.09	1.62	2.07	1.58	52.77
BY HOUSING TENURE						
Homeowner	4.37	2.54	1.94	2.11	1.50	80.26
Renter	3.03	1.70	1.32	1.57	1.10	55.94
BY TYPE OF AREA						
Urban	3.87	2.19	1.70	1.96	1.36	71.88
Rural	3.99	2.49	1.81	1.63	1.31	69.01

Source: U.S. Department of Labor, Bureau of Labor Statistics, 1989 Consumer Expenditure Survey

Average Weekly At-Home Meat Expenditures by Type, 1989

	DOLLARS PER CONSUMER UNIT
BEEF	$3.89
Ground Beef	1.68
Roasts	.63
Steaks	1.28
Other	.30
PORK	2.24
Bacon	.36
Chops	.56
Ham	.54
Sausage	.30
Other	.48
OTHER MEATS	1.72
Frankfurters	.36
Lunch Meats (Cold Cuts)	1.21
Lamb	.15
POULTRY	1.92
Fresh Whole Chicken	.33
Fresh & Frozen Chicken Parts	1.14
Other	.45
FISH AND SEAFOOD	1.36
Canned	.35
Fresh and Frozen Shellfish	.32
Fresh and Frozen Finfish	.68

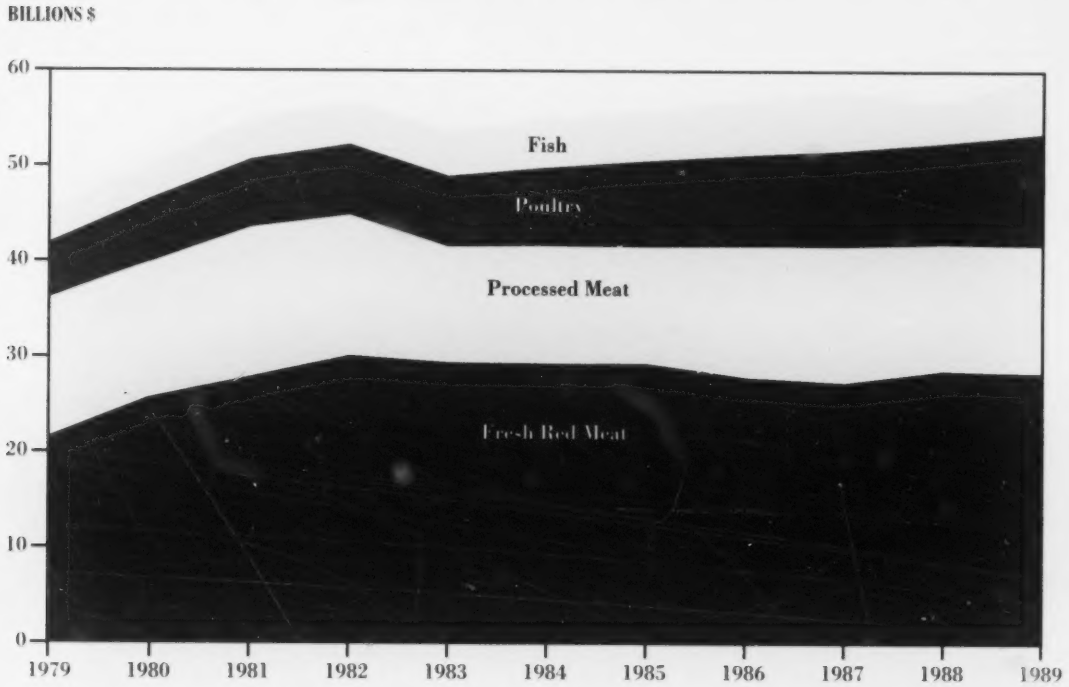
Source: U.S. Department of Labor, Bureau of Labor Statistics, 1989 Consumer Expenditure Survey

Consumer Expenditures for Meat, Poultry and Fish in Grocery Stores, 1989 & 1979

	1989 $ Million	% OF FOOD & BEVERAGES	% OF TOTAL	1979 $ Million	% OF FOOD & BEVERAGES	% OF TOTAL	% CHANGE 1979–1989
FRESH MEAT	$26,807	10.9%	8.1%	$21,336	15.4%	11.9%	+26%
Beef	20,976	8.6	6.4	16,228	11.7	9.9	+29%
Veal	530	.2	.2	637	.5	.4	–17%
Lamb	1,175	.5	.4	777	.6	.4	+51%
Pork	4,126	1.7	1.3	3,693	2.7	2.1	+12%
PACKAGED MEATS	13,567	5.5	4.1	12,939	9.4	7.2	+5%
Cured Hams & Picnics	2,067	.8	.6	2,238	1.6	1.2	– 8%
Packaged Bacon	2,102	.9	.6	1,916	1.4	1.1	+10%
Frankfurters	1,681	.7	.5	1,424	1.0	.8	+18%
Sausages	1,217	.5	.4	972	.7	.5	+25%
Other Sausage Products	2,944	1.2	.9	2,437	1.8	1.4	+21%
Cold Cuts	3,557	1.5	1.1	3,952	2.9	2.2	–10%
FROZEN MEAT	202	.1	.1	197	.1	.1	+3%
CANNED MEAT	1,258	.5	.4	1,721	1.2	1.0	–27%
TOTAL ABOVE	41,834	17.1	12.7	36,193	26.2	20.1	+16%
POULTRY	11,563	4.7	3.5	5,801	4.2	3.2	+99%
Fresh	9,122	3.7	2.8	4,490	3.2	2.5	+103%
Frozen	2,287	.9	.7	1,235	.9	.7	+85%
Canned	154	.1	*	76	.1	*	+103%
FISH & SEAFOOD	6,384	2.6	1.9	3,394	2.5	1.9	+88%
Fresh	3,630	1.5	1.1	1,524	1.1	.8	+138%
Frozen	704	.3	.2	465	.3	.3	+51%
Canned	2,050	.8	.6	1,405	1.0	.8	+46%
TOTAL MEAT, POULTRY & SEAFOOD	59,781	24.4	18.1	45,388	32.8	25.3	+32%
TOTAL GROCERY STORE SALES	329,688	—	100.0	179,717	—	100.0	+83%
Food & Beverages	244,910	100.0	—	138,317	100.0	—	+77%
Non-Foods & General Merchandise	84,778	—	—	41,400	—	—	+105%

Source: Compiled from Supermarket Business magazine
Totals may not add due to rounding
Does not include meats sold through service delis or in prepared forms (i.e., frozen dinners, entrees, etc.)
**Less than 0.05*

Consumer Expenditures for Meat, Poultry and Fish in Grocery Stores, 1979–89



Grocery Stores: Percentage of Meat Sales by Type

	BEEF	PORK	VEAL	LAMB	POULTRY	FISH & SEAFOOD	PROCESSED & FROZEN	OTHER
				Percent				
RETAIL SALES (MIL. $)								
Under $10	41.9%	20.2%	1.6%	1.7%	21.0%	4.0%	6.2%	3.5%
$10–$30	39.3	19.7	1.7	1.8	19.4	4.7	10.5	3.1
$31–$100	39.5	19.5	1.3	1.5	19.2	5.1	8.8	5.1
$101–$250	40.3	16.2	1.9	2.3	21.4	4.4	10.8	2.9
$251–$500	39.7	13.9	1.4	1.6	18.0	4.2	19.5	2.2
$501+	36.9	15.0	1.4	1.6	19.1	4.3	17.4	4.8
RETAIL AFFILIATION								
Chain	37.3	15.1	1.4	1.7	19.1	4.4	17.1	4.5
Independent	41.1	19.1	1.8	1.9	19.2	4.6	8.7	3.7
HEADQUARTERS REGION								
Northeast	39.6	13.1	2.1	2.9	20.6	5.1	7.9	8.7
Middle Atlantic	40.8	16.8	2.4	1.8	22.5	3.4	10.5	2.1
East North Central	36.4	16.0	1.2	1.2	15.3	6.4	21.7	2.5
West North Central	39.5	16.2	1.2	1.1	15.5	2.7	11.1	12.5
Southeast	38.2	12.2	1.5	2.1	15.8	3.8	20.7	5.9
West South Central	38.6	16.0	1.1	1.3	19.8	3.0	18.4	2.0
Mountain	43.8	12.9	1.1	1.4	14.7	3.5	20.2	2.8
Pacific	35.3	18.5	1.1	1.2	25.2	4.2	11.3	4.2
Average	**37.6**	**15.3**	**1.4**	**1.7**	**19.2**	**4.3**	**16.6**	**4.4**

Source: Food Marketing Institute, The Food Marketing Industry Speaks, 1986
May not add due to rounding.

Retail Beef Cuts*: Percentage of Bone-In vs. Boneless

REGION	BONE-IN	BONELESS
Northeast & East	32%	68%
Southeast	22	78
North Central	39	61
South Central	10	90
Mountain	44	56
West	21	79
Average	28	72
PRIMAL ORIGIN		
Chuck	35	65
Round	5	95
Loin	49	51
Rib	54	46

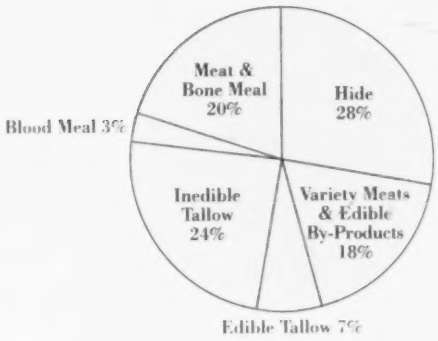
Average Fat Thickness on Retail Beef Cuts

	PRIMAL CUT ORIGIN OF RETAIL CUT				
	Round	Loin	Rib	Chuck	Average*
REGION					
Northeast & East	.12	.18	.10	.08	.12
Southeast	.13	.15	.14	.12	.14
North Central	.12	.19	.13	.12	.14
South Central	.07	.15	.12	.06	.10
Mountain	.17	.27	.04	.16	.16
West	.12	.26	.20	.13	.18
Average	.12	.19	.12	.11	.14

Source: Texas A&M University "National Beef Market Basket Study", 1988
Distribution by total weight in meat case

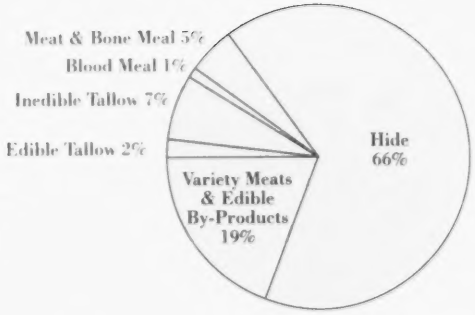
Cattle By-Products: Yields and Value

The average steer yielded 218 pounds of by-products...



Percentage Breakdown of By-Product Yield

...valued at $96.72 in 1990



Percentage Breakdown of By-Product Value

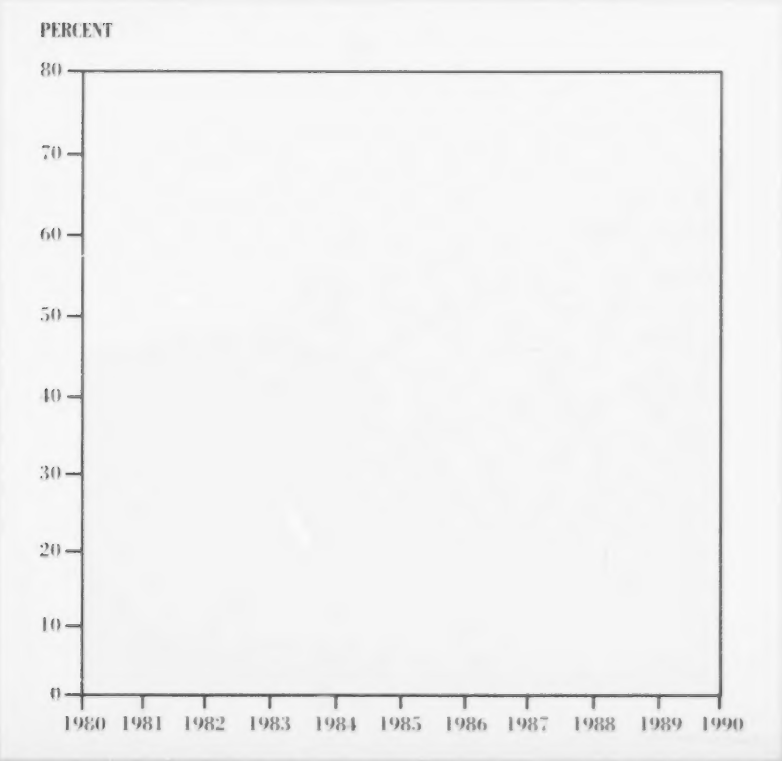
Source: U.S. Department of Agriculture

Cattle By-Product and Hide Values, 1980–90

	TOTAL BY-PRODUCT VALUE	BUTT BRANDED STEER HIDE VALUE	HIDE AS PERCENT OF BY-PRODUCT VALUE
	Dollars Per Hundred Pounds, Live		
1980	$6.36	$2.80	44.0%
1981	6.02	2.79	46.3
1982	5.58	2.63	47.1
1983	5.91	2.98	50.4
1984	6.68	3.87	57.9
1985	5.84	3.39	58.0
1986	6.28	4.06	64.6
1987	7.79	5.17	66.4
1988	8.56	5.42	63.3
1989	8.10	5.28	65.2
1990	8.41	5.59	66.5

Source: U.S. Department of Agriculture

Hides as Percent of Total By-Product Value



Cattlehide Prices, 1970–1990

	HEAVY NATIVE STEERS	BUTT BRANDED STEERS	BRANDED COWS
	Cents per Pound, Conventional Basis		
1970	12.7¢	11.0¢	11.5¢
1971	14.4	11.9	11.5
1972	29.7	27.2	28.0
1973	33.7	28.6	28.8
1974	23.0	19.5	19.1
1975	23.5	20.9	17.6
1976	33.0	30.9	30.4
1977	36.2	33.5	33.1
1978	47.2	45.6	46.1
1979	72.5	66.8	68.7
1980	44.5	41.9	42.2
1981	43.8	42.0	41.8
1982	42.3	39.6	36.7
1983	50.1	46.9	42.9
1984	60.6	55.8	53.9
1985	54.0	51.0	43.6
1986	63.7	60.4	50.0
1987	79.9	76.4	68.7
1988	87.3	81.0	76.9
1989	89.4	79.6	75.0
1990	91.5	83.7	76.7

Source: Leather Industries of America, U.S. Leather Industry Statistics

Export Value of Beef and Related Products, 1980–90

	BEEF & VEAL	VARIETY MEATS	TALLOW	HIDES	TOTAL
			Million Dollars		
1980	$249.3	$243.8	$697.7	$681.0	$1,871.8
1981	300.0	250.8	700.2	661.5	1,912.5
1982	373.2	247.2	615.3	732.7	1,968.4
1983	391.8	218.3	556.0	765.0	1,931.1
1984	469.6	230.3	661.5	1,112.7	2,474.1
1985	467.2	248.6	582.3	1,035.6	2,333.7
1986	634.2	289.7	388.0	1,245.4	2,557.3
1987	771.2	305.5	373.7	1,370.9	2,821.3
1988	1,109.0	375.1	503.0	1,554.0	3,541.1
1989	1,418.7	301.6	426.9	1,453.0	3,600.2
1990	1,580.3	387.4	354.5	1,337.4	3,659.6

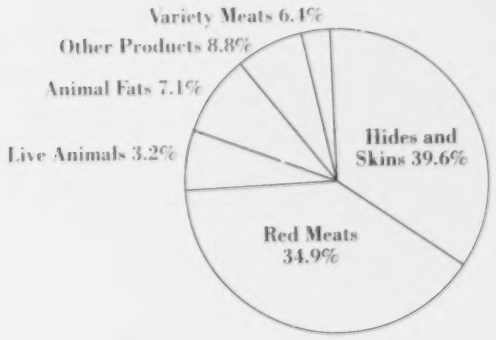
Source: U.S. Department of Agriculture

Meat and Related Products: Value of United States Imports and Exports, 1988–90

ITEM	IMPORTS			EXPORTS		
	1988	1989	1990	1988	1989	1990
	Million Dollars					
Beef and Veal	$1,679.3	$1,639.8	$1,861.0	$1,109.0	$1,418.7	$1,580.3
Pork	933.5	752.4	938.2	249.4	329.6	326.9
Other Meats	68.9	73.1	56.2	23.7	39.3	63.4
Variety Meats	32.4	82.8	75.7	442.0	354.3	361.0
Tallow, Greases and Lard	2.0	44.7	72.3	559.1	495.8	401.3
Casings	80.0	63.7	53.3	30.0	31.6	32.3
Hides, Skins and Leather	104.8	98.1	86.8	2,095.4	2,102.7	2,237.4
Wool, Mohair and Other Hair	305.8	327.7	182.1	119.0	129.7	106.3

Source: U.S. Department of Agriculture

Livestock, Meat and Related Products— Share of Total Export Value, 1990



TOTAL EXPORT VALUE = $5.651 BILLION

Source: U.S. Department of Commerce

U.S. Imports, Exports, and Net Imports of Beef and Veal, Pork, Lamb and Mutton, and Total Meat in Relation to Domestic Production, 1981–90

	PRODUCTION	IMPORTS	EXPORTS	NET IMPORTS	IMPORTS	EXPORTS	NET IMPORTS
	Million Pounds Carcass Equivalent				Percent of U.S. Production		
	BEEF AND VEAL						
1981	22,628	1,761	221	1,540	7.8%	1.0%	6.8%
1982	22,789	1,958	254	1,704	8.6	1.1	7.5
1983	23,488	1,950	276	1,674	8.3	1.2	7.1
1984	23,897	1,847	336	1,511	7.7	1.4	6.3
1985	24,056	2,091	332	1,759	8.7	1.4	7.3
1986	24,722	2,156	526	1,630	8.7	2.1	6.6
1987	23,821	2,294	611	1,683	9.6	2.6	7.1
1988	23,811	2,406	690	1,716	10.1	2.9	7.2
1989	23,318	2,179	1,023	1,156	9.3	4.4	4.9
1990	22,950	2,356	1,006	1,350	10.3	4.4	5.9
	PORK						
1981	15,717	542	307	235	3.4	2.0	1.5
1982	14,121	612	214	398	4.3	1.5	2.8
1983	15,117	699	220	479	4.6	1.4	3.2
1984	14,720	954	164	790	6.5	1.1	5.4
1985	14,728	1,128	128	1,000	7.7	.9	6.8
1986	13,998	1,122	86	1,036	8.0	.6	7.4
1987	14,312	1,195	109	1,086	8.3	.8	7.6
1988	15,623	1,137	195	942	7.3	1.2	6.0
1989	15,759	895	262	633	5.7	1.7	4.0
1990	15,300	898	239	659	5.9	1.6	4.3
	LAMB AND MUTTON						
1981	328	31	3	28	9.5	.9	8.5
1982	356	21	2	19	5.9	.6	5.3
1983	367	18	2	16	4.9	.5	4.4
1984	371	20	2	18	5.4	.5	4.9
1985	352	36	1	35	10.2	.3	10.0
1986	331	41	2	39	12.4	.6	11.8
1987	309	44	2	42	14.2	.6	13.6
1988	329	51	1	50	15.5	.3	15.2
1989	341	63	2	61	18.5	.6	17.9
1990	358	58	3	55	16.2	.8	15.4
	TOTAL MEAT						
1981	38,673	2,334	531	1,803	6.0	1.4	4.7
1982	37,266	2,592	470	2,122	7.0	1.3	5.7
1983	38,972	2,667	497	2,170	6.8	1.3	5.6
1984	38,988	2,821	501	2,320	7.2	1.3	5.9
1985	39,136	3,255	461	2,794	8.3	1.2	7.1
1986	39,051	3,319	614	2,705	8.5	1.6	6.9
1987	38,442	3,533	722	2,811	9.2	1.9	7.3
1988	39,763	3,594	886	2,708	9.0	2.2	6.8
1989	39,418	3,137	1,287	1,850	8.0	3.3	4.7
1990	38,608	3,312	1,248	2,064	8.6	3.2	5.3

Source: U.S. Department of Agriculture

U.S. Exports of Selected Red Meat and Livestock Products by Major Markets, 1988–90

	QUANTITY			VALUE		
	1988	1989	1990	1988	1989	1990
	Thousand Metric Tons			Million Dollars		
FRESH OR FROZEN BEEF AND VEAL	214.5	379.1	340.0	$1,043.1	$1,391.8	1,545.4
Japan	158.3	270.2	191.9	811.6	1,002.0	951.4
Canada	16.1	31.4	64.9	69.5	119.4	286.6
South Korea	5.1	21.5	32.6	23.7	78.8	115.5
Mexico	14.1	29.6	28.1	36.6	76.2	79.9
FRESH OR FROZEN PORK	54.6	79.3	66.8	226.9	298.7	287.5
Japan	38.2	49.9	42.1	181.8	222.5	224.3
Mexico	10.2	19.3	10.9	23.7	48.4	30.8
Canada	1.9	2.6	3.6	6.5	8.4	12.6
VARIETY MEATS	302.1	245.2	228.6	442.0	354.0	361.0
BEEF	214.6	181.1	160.4	375.1	301.6	297.5
Japan	67.4	90.7	79.6	176.7	209.3	211.3
Mexico	36.5	35.0	27.3	44.9	40.0	31.6
Egypt	28.8	22.4	15.7	15.3	13.9	11.1
Canada	9.6	1.4	11.9	24.7	1.5	11.0
European Community	60.1	7.7	5.5	97.0	10.1	8.5
PORK	84.0	60.0	65.4	62.3	47.1	59.9
Mexico	56.6	35.6	42.4	40.8	24.5	32.0
Japan	1.3	2.0	2.6	2.9	5.8	12.8
European Community	10.7	13.6	12.0	8.0	10.6	8.5
INEDIBLE TALLOW AND WHITE GREASE	1,221.4	1,086.9	920.1	479.7	391.0	311.9
European Community	188.7	157.7	121.1	68.0	52.2	38.7
Mexico	120.9	111.4	78.7	50.0	44.1	27.7
Turkey	31.7	83.5	68.8	12.8	30.8	24.4
U.S.S.R.	65.0	77.3	67.8	26.4	26.0	22.6
	Thousand Whole Hides					
CATTLE HIDES (Whole)	24,363	23,234	21,324	1,466.0	1,296.9	1,286.6
South Korea	9,961	10,313	9,839	636.9	604.0	615.2
Japan	7,012	6,206	6,755	416.1	353.2	411.6
Taiwan	2,471	1,844	1,476	157.0	104.2	93.2
Mexico	1,833	1,282	1,377	89.6	62.9	69.5

Source: U.S. Department of Commerce

U.S. Imports of Selected Red Meat Products by Major Markets, 1988–90

	QUANTITY			VALUE		
	1988	1989	1990	1988	1989	1990
	Thousand Metric Tons			Million Dollars		
BONELESS BEEF	**670.5**	**608.1**	**672.7**	**$1,411.3**	**$1,399.3**	**$1,602.8**
Australia	357.8	272.8	361.3	754.9	627.8	839.6
New Zealand	210.3	219.0	191.8	445.4	511.8	476.2
Canada	39.4	57.1	55.0	69.1	117.8	124.1
Costa Rica	23.6	19.7	18.8	56.4	51.0	49.7
CANNED CORNED BEEF	**39.3**	**29.7**	**29.9**	**78.0**	**69.4**	**74.7**
Argentina	16.8	16.9	19.0	32.8	38.7	48.2
Brazil	21.5	11.7	8.1	42.8	27.6	18.6
Uruguay	.6	.7	2.6	1.3	1.6	6.5
FRESH OR FROZEN PORK	**282.7**	**135.9**	**136.5**	**447.0**	**244.5**	**307.6**
Canada	213.8	100.7	84.0	342.3	170.4	185.0
European Community	57.2	26.1	44.2	112.9	56.6	103.3
CANNED HAMS & SHOULDERS	**139.1**	**108.4**	**101.7**	**415.2**	**332.5**	**389.3**
Denmark	57.1	38.7	44.1	190.3	131.6	174.7

Source: U.S. Department of Commerce

Livestock Inventories in Selected Countries,[1] 1990

	CATTLE & CALVES	HOGS	SHEEP & LAMBS
	Thousand Head on January 1		
NORTH AMERICA			
Canada	11,201	10,694	N.A.
Mexico	31,747	8,563	N.A.
United States	98,162	53,821	11,363
CENTRAL AMERICA			
Costa Rica	1,762	N.A.	N.A.
Guatemala	1,900	1,120	N.A.
Honduras	3,000	N.A.	N.A.
SOUTH AMERICA			
Argentina	50,582	N.A.	28,571
Brazil	98,228	37,500	N.A.
WESTERN EUROPE			
Belgium-Luxembourg	3,277	6,551	161
Denmark	2,232	9,120	100
France	19,980	11,860	11,500
West Germany	14,563	22,165	1,533
Greece	715	820	10,400
Ireland	5,899	995	5,782
Italy	8,853	9,261	11,695
Netherlands	4,731	13,634	1,500
Portugal	1,343	2,247	3,024
Spain	5,300	16,910	26,200
United Kingdom	11,933	7,383	29,521
European Community	78,826	100,946	101,416
Austria	2,562	3,773	N.A.
Switzerland	1,848	1,857	N.A.
Sweden	1,678	2,175	N.A.
EASTERN EUROPE			
Czechoslovakia	5,129	7,498	1,087
East Germany	5,724	12,073	2,603
Hungary	1,598	7,660	2,069
Poland	10,143	18,685	4,196
Romania	6,283	11,659	15,442
Yugoslavia	4,692	7,230	7,603
U.S.S.R.	118,300	78,900	140,500
ASIA			
China	101,380	352,000	211,000
Japan	4,760	11,816	N.A.
Taiwan	165	7,783	N.A.
OCEANIA			
Australia	24,564	2,765	187,384
New Zealand	7,721	380	60,600

Source: U.S. Department of Agriculture
[1]Preliminary data for countries other than U.S.
N.A.—Not Available

Red Meat Production in Selected Countries,[1] 1990

	BEEF & VEAL	PORK	LAMB & MUTTON
	Thousand Metric Tons		
NORTH AMERICA			
Canada	950	1,140	N.A.
Mexico	1,840	792	76
United States	10,464	6,964	158
CENTRAL AMERICA			
Costa Rica	82	N.A.	N.A.
Guatemala	59	14	N.A.
Honduras	34	N.A.	N.A.
SOUTH AMERICA			
Argentina	2,520	N.A.	99
Brazil	2,150	1,050	N.A.
WESTERN EUROPE			
Belgium-Luxembourg	326	738	7
Denmark	203	1,200	2
France	1,710	1,870	150
West Germany	1,612	2,680	33
Greece	80	150	129
Ireland	464	146	84
Italy	1,130	1,285	80
Netherlands	475	1,625	14
Portugal	123	218	27
Spain	455	1,730	260
United Kingdom	999	975	360
European Community	7,577	12,617	1,146
Austria	212	405	N.A.
Switzerland	160	275	N.A.
Sweden	146	298	N.A.
EASTERN EUROPE			
Czechoslovakia	498	962	10
East Germany	330	1,100	9
Hungary	101	931	4
Poland	702	1,767	21
Romania	212	620	70
Yugoslavia	308	775	65
U.S.S.R.	8,700	6,800	1,000
ASIA			
China	1,180	21,600	990
Japan	535	1,595	N.A.
Taiwan	6	990	N.A.
OCEANIA			
Australia	1,671	305	650
New Zealand	445	43	495

Source: U.S. Department of Agriculture
[1]Preliminary data for countries other than U.S.
N.A.—Not Available

Per Capita Meat Disappearance in Selected Countries,[1] 1990

	BEEF & VEAL	PORK	LAMB, MUTTON & GOAT	POULTRY
	Pounds Per Person[2]			
NORTH AMERICA				
Canada	86.2	73.2	N.A.	61.1
Mexico	47.0	20.2	2.2	19.0
United States	97.4	64.1	1.7	90.3
CENTRAL AMERICA				
Costa Rica	45.0	N.A.	N.A.	N.A.
Panama	51.8	N.A.	N.A.	N.A.
SOUTH AMERICA				
Argentina	143.3	N.A.	5.7	27.1
Brazil	30.4	15.0	N.A.	30.2
Columbia	49.6	9.7	N.A.	N.A.
Uruguay	127.0	N.A.	.0	N.A.
Venezuela	39.9	12.8	N.A.	24.7
WESTERN EUROPE				
Belgium-Luxembourg	49.2	104.9	3.7	35.1
Denmark	42.5	147.7	2.2	25.8
France	63.7	82.2	11.2	46.3
West Germany	50.3	109.8	2.2	25.8
Greece	54.5	46.3	32.0	34.8
Ireland	45.4	77.4	19.0	40.3
Italy	58.9	68.3	4.0	41.0
Netherlands	37.7	99.0	1.5	35.5
Portugal	30.2	53.1	7.5	45.9
Spain	24.5	100.5	15.0	50.3
United Kingdom	46.5	58.0	14.3	42.3
Austria	47.8	116.0	N.A.	27.1
Finland	45.6	70.3	N.A.	14.6
Sweden	37.9	73.0	N.A.	N.A.
Switzerland	55.6	90.2	N.A.	N.A.

Per Capita Meat Disappearance in Selected Countries,[1] 1990, continued

	BEEF & VEAL	PORK	LAMB, MUTTON & GOAT	POULTRY
	Pounds Per Person[2]			
EASTERN EUROPE				
Bulgaria	32.4	103.0	19.0	N.A.
Czechoslovakia	65.7	130.3	.9	29.8
East Germany	41.2	121.7	1.5	26.5
Hungary	16.3	168.7	.4	51.1
Poland	39.0	103.2	1.3	17.4
Romania	28.7	72.1	4.6	25.4
Yugoslavia	30.4	75.0	5.7	28.9
U.S.S.R	67.7	53.6	7.7	27.1
MIDDLE EAST				
Israel	36.6	N.A.	N.A.	77.6
Saudi Arabia	6.4	N.A.	14.6	57.3
AFRICA				
Egypt	22.0	N.A.	2.4	4.4
South Africa	37.9	N.A.	11.9	31.3
ASIA				
China	2.2	42.1	2.0	6.0
Hong Kong	32.2	94.1	N.A.	73.4
Japan	18.7	37.7	2.4	31.7
Korea	11.2	74.5	.0	N.A.
Taiwan	5.5	85.8	N.A.	53.8
Philippines	5.1	22.3	N.A.	N.A.
OCEANIA				
Australia	88.4	38.4	50.7	54.0
New Zealand	79.6	30.9	64.2	N.A.

Source: U.S. Department of Agriculture
[1]Preliminary data for countries other than U.S.
[2]Carcass weight basis
N.A.—Not Available

World Meat Trade in Selected Countries,[1] 1990

	BEEF & VEAL		PORK		LAMB & MUTTON	
	Imports	Exports	Imports	Exports	Imports	Exports
	Thousand Metric Tons, Carcass Equivalent					
NORTH AMERICA						
Canada	182	100	15	275	N.A.	N.A.
Mexico	35	5	25	N.A.	9	N.A.
United States	1,052	456	401	108	26	1
CENTRAL AMERICA						
Costa Rica	N.A.	20	N.A.	N.A.	N.A.	N.A.
Guatamala	N.A.	17	N.A.	N.A.	N.A.	N.A.
Honduras	N.A.	11	N.A.	N.A.	N.A.	N.A.
SOUTH AMERICA						
Argentina	N.A.	425	N.A.	N.A.	N.A.	10
Brazil	180	230	5	25	N.A.	N.A.
Uruguay	N.A.	190	N.A.	N.A.	N.A.	N.A.
WESTERN EUROPE						
Belgium-Luxembourg	22	118	43	321	16	5
Denmark	40	119	14	878	3	N.A.
France	390	440	435	205	130	5
West Germany	339	679	580	313	33	8
Greece	170	0	62		16	0
Ireland	13	363	18	51	N.A.	54
Italy	445	70	525	10	23	3
Netherlands	70	340	54	1,067	5	6
Portugal	19	N.A.	34	N.A.	8	N.A.
Spain	50	48	72	4	15	2
United Kingdom	314	125	525	61	125	81
European Community*	427	834	62	637	215	10
Austria	3	18	0	3	N.A.	N.A.
Switzerland	12	1	2	1	N.A.	N.A.
Sweden	8	9	15	31	N.A.	N.A.
EASTERN EUROPE						
Czechoslovakia	20	50	5	40	N.A.	3
East Germany	75	50	50	250	N.A.	0
Hungary	17	40		128	N.A.	2
Poland	2	43	20	59	N.A.	N.A.
Romania	100	0	150	5	N.A.	20
Yugoslavia	55	24	60	15	N.A.	3
U.S.S.R.	250	5	280	5	15	1
ASIA						
China	N.A.	65	1	124	0	3
Hong Kong	75	1	215	3	N.A.	N.A.
Japan	520	N.A.	485	N.A.	124	N.A.
Taiwan	46	N.A.	N.A.	210	N.A.	N.A.
Korea	117	N.A.	2	6	N.A.	N.A.
OCEANIA						
Australia	N.A.	1,050	N.A.	10	N.A.	247
New Zealand	N.A.	359	2	0	N.A.	435

Source: U.S. Department of Agriculture
1Preliminary data for countries other than U.S.
****Excludes intra-EC trade; figures for EC countries reflect third country trade as well as intra-EC trade***
N.A.—Not Available

The American Meat Institute was founded in 1906 and represents approximately 400 meat packers and processors who produce over 90% of this country's meat and approximately 500 suppliers of meat equipment, products and services. The Institute serves members and the general public through its Departments of Congressional Affairs, Regulatory Affairs, Science and Technical Affairs, Public Affairs, Convention Services, and Education and Member Services.

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